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ABSTRACT

This teacher resource manual is a support document developed to assist teachers responsible for Enterprise and Innovation courses; it is intended to be used in conjunction with the corresponding program of studies in the curriculum for Alberta, Canada. The manual has been developed to assist classroom teachers by providing the following: (1) instructional strategies, such as small groups and teaching for thinking; (2) venture project development alternatives; (3) evaluation strategies; (4) learning resources; (5) resources correlated by module; and (6) other learning materials and resource agencies. Lesson plans are developed identifying concept and learner expectations, correlated with resources and suggested instructional strategies and learning activities. The following sections are included: program rationale, philosophy, and organization; general, module, and specific learner expectations; assessing student achievement; instructional strategies; building a support network; instructional strategies and activities for eight modules (challenge and opportunity; planning a venture; making it happen; and analyzing, financing, marketing, managing, and expanding the venture); and learning resources (policy, instructional materials, print and audiovisual, resources correlation, Alberta Education resources and related documents, National Film Board of Canada, ACCESS Network, urban and regional resource centers, other learning resources and agencies, and community and regional organizations). (KC)

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ENTERPRISE & INNOVATION



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PROGRAM RATIONALE AND PHILOSOPHY

Enterprising individuals are agents of change. They make things happen. They recognize opportunities for improvement in goods, services and processes and undertake to mobilize resources to meet challenges, to innovate. They develop new ways of responding to the many changes and challenges we face in an increasingly competitive and interrelated world.

Schools can play a key role in helping students become more enterprising and innovative. Enterprise and Innovation is designed to challenge high school students of all ability levels to expand their confidence, experience and skills as innovators and leaders, encouraging them to recognize how these competencies can help them succeed in any career, whether as a volunteer, an employer or an employee.

One such career area, entrepreneurship, depends particularly on the ability to be enterprising and innovative. **Entrepreneurship** involves the recognition of opportunities (needs, wants and problems) and the use of resources to implement innovative ideas for new, thoughtfully planned ventures. **Intrapreneurship** is entrepreneurship occurring within an existing organization.

Throughout Enterprise and Innovation, entrepreneurship will be used frequently as the context for learning, helping students develop expertise at:

- identifying opportunities
- monitoring and revising plans as necessary
- marshalling resources
- developing sensitivity to the needs and wants of client groups
- developing and implementing plans
- building teamwork and leadership skills.

Within a secure and supportive environment students will have opportunities to develop and implement venture plans, either simulated or in real terms. These venture plans could be community- or public service- or profit-related. Through these ventures, students will develop numeracy, communication, decision-making and

social skills. Students will be encouraged to link the competencies they have developed through past experiences, hobbies and interests with and between those of core and complementary courses.

Ventures can take many forms. For example, students might:

- establish a business venture
- establish a volunteer, community or service program
- plan, market and manage an event or a conference
- produce, market and distribute a book or video.

These venture plans link technical, managerial, enterprise and innovation competencies. At the same time, opportunities to better understand career options can help students invest their energies more effectively in those occupational areas they prefer and in which they have the aptitude to succeed. The program helps students understand basic economic principles and business processes. In addition, they develop an increased awareness and appreciation of the roles of small business, entrepreneurship and self-employment in society.

High school students make crucial career decisions as they move toward independence and adult responsibilities. In view of the frequent career changes that students can expect to experience throughout their work life, they need to develop competencies that can be transferred readily. They need to be able to recognize opportunity and to develop confidence in their ability to act on that opportunity. This process involves identifying and assessing their strengths, aptitudes and interests as they prepare to leave high school, continue in post-secondary programs, or move directly into the workplace.

PROGRAM ORGANIZATION

Enterprise and Innovation modules may be offered by schools at the senior high level, using the following course codes:

<u>Introductory Level Modules</u>	<u>Codes</u>
1. Challenge and Opportunity	4001
2. Planning a Venture	4002
<u>Intermediate Level Modules</u>	<u>Codes</u>
3. Making It Happen	5004
4. Analyzing Ventures	5001
5. Financing Ventures	5002
6. Marketing the Venture	5003
<u>Advanced Level Modules</u>	<u>Codes</u>
7. Managing the Venture	6001
8. Expanding the Venture	6002

Each module equals 1 credit. Courses may be designed using only Enterprise and Innovation modules or by combining Enterprise and Innovation within other Career and Technology Studies strands. During the optional implementation period, 1992-1996, modules from business education, home economics or industrial education may also be used in combination with Enterprise and Innovation modules to form courses.

The Scope and Sequence chart on page 4 outlines the module prerequisites and recommendations for combining these modules to form courses.

THEMES

Themes provide the guiding focus for individual modules. This CTS strand has three themes.

Getting the Idea

Students will learn to recognize opportunities, generate ideas and mobilize resources to meet society's needs in creative, new and innovative ways.

Preparing for Action

Students will be challenged to formalize their venture planning skills by examining the elements of planning and the various methods of identifying, assessing and minimizing risk. Using this knowledge, they will select, plan and assess a specific venture. The expansion modules provide an opportunity for students to analyze and assess the financing alternatives and feasibility of various ventures.

Making It Happen

Students will have a venture plan, which they will put into action. They will "Make It Happen". Students will apply management and marketing strategies to their venture and, if appropriate, may also expand it.

Results-based, Levels Organized Curriculum

Enterprise and Innovation is a results-based curriculum which is organized into three levels.

The three levels of competency are introductory, intermediate and advanced.

- The introductory level modules are directed at students without any previous experience and provide the basic competencies* needed for personal use or daily living as well as the foundation for further study.
- The intermediate level modules are directed at students who can demonstrate the competencies outlined for the two introductory level foundation modules and who are exploring career options.
- Advanced level modules are directed at students who can demonstrate the introductory and intermediate level competencies and are preparing themselves for further education or the workplace.

* Competencies are the knowledge, skills and attitudes that are demonstrated through the performance of specific activities.

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PREFACE

This teacher resource manual is a support document developed to assist teachers responsible for Enterprise and Innovation. It is to be used in conjunction with the corresponding program of studies.

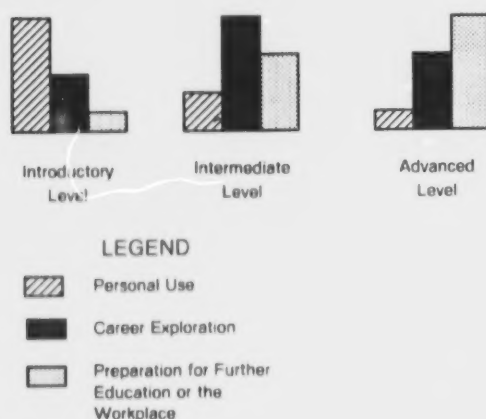
This manual has been developed to assist classroom teachers by providing:

- instructional strategies, such as:
 - small groups
 - teaching for thinking
- venture project development alternatives
- evaluation strategies
- learning resources
- resources correlation by module
- other learning materials and resource agencies.

Teachers are encouraged to use this manual as a practical planning and instructional tool. It is hoped that teachers will add their own materials and replace those that do not suit the unique needs of their students and classes.

Note: This publication is a support document. The advice and direction offered is suggestive except where it duplicates or paraphrases the contents of the program of studies. In these instances, the content is screened in the same distinctive manner as this notice so that the reader may readily identify all prescriptive statements or segments of the document.

The emphasis, or focus, will vary over the three levels from daily living, career exploration and transition into the workplace or further education.



- describes the knowledge, skills and attitudes (competencies) that students are expected to acquire
- encourages school jurisdictions, schools, and teachers to assess a broader range of student learning provincially and locally; e.g., performance-based assessment including portfolios of student work, group projects, open-ended and problem-solving questions on tests.

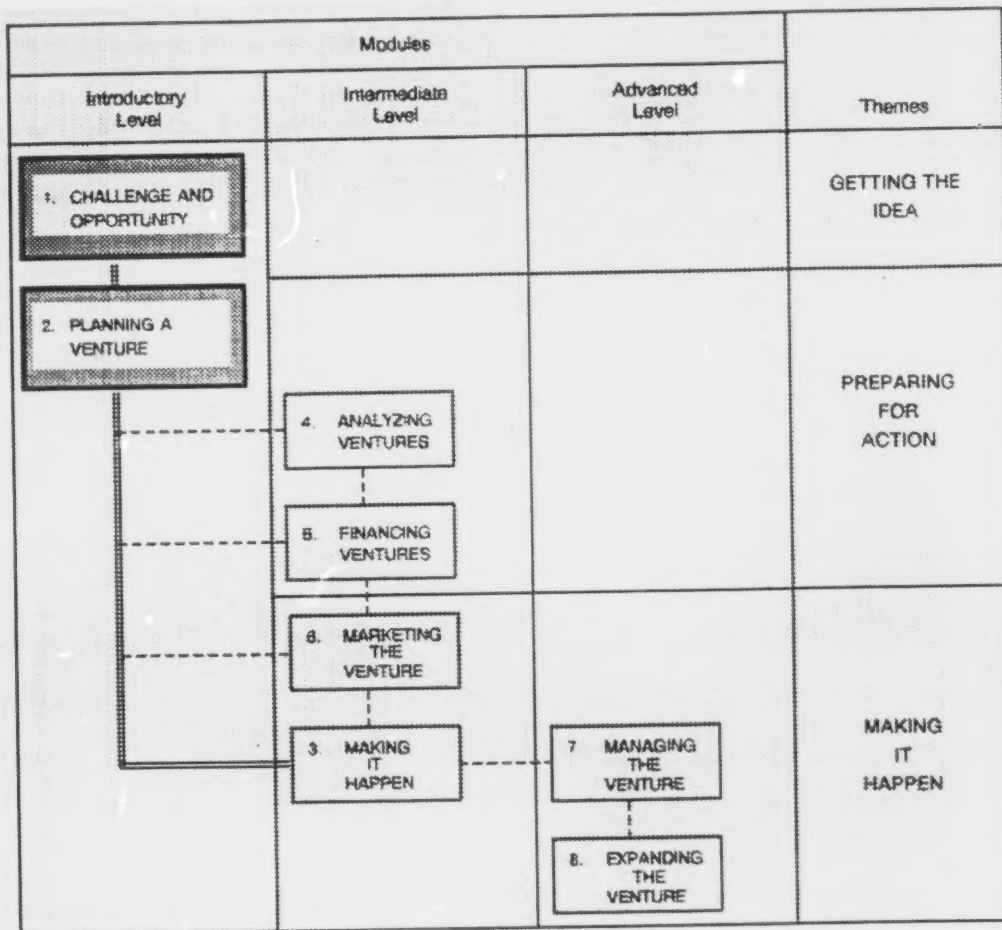
As a levels-organized curriculum, Enterprise and Innovation:

- recognizes that student achievement, rather than age or time in school, is the basis for assessing and reporting student progress
- provides for sequencing of curriculum expectations based on principles of learning and child development (cognitive, physical, and social development)
- recognizes that the learning result at one level is the starting point for learning at the next level
- identifies clusters of expectations to be achieved at each of the three levels
- supports continuity in student learning
- provides milestones for reporting student achievement.

As a results-based curriculum, Enterprise and Innovation:

- specifies results rather than means by which results are to be achieved
- provides opportunity for local decision making regarding resources and processes used to achieve results
- recognizes that the amount of time to be allocated for learning activities and courses is part of an instructional plan, not part of the curriculum

SCOPE AND SEQUENCE



Foundation*

Expansion

Double solid line indicates recommended sequence when a limited number of modules are offered.

Broken line indicates a possible sequence when more time is available for an expanded program.

- * Students who can demonstrate the competencies outlined for the foundation modules in Enterprise and Innovation may proceed directly to expansion modules.

LEARNER EXPECTATIONS

Learner expectations describe the competencies that students are to develop. They require students to be active learners who can combine knowledge, skills and attitudes within an applied context.

Learner expectations for Enterprise and Innovation are categorized in three, progressively detailed, stages: general, module and specific learner expectations.

GENERAL LEARNER EXPECTATIONS

General learner expectations for Enterprise and Innovation serve as the foundation for the module and specific learner expectations. They comprise the competencies to help students become:

- more comfortable with change and innovation
- more entrepreneurial or intrapreneurial in any career, whether as a volunteer, an employer or an employee
- more accepting of both success and failure as learning opportunities
- more sophisticated consumers of business services
- more aware of public and private sector development initiatives and investments.

In order to achieve these competencies, the student will:

- identify and enhance personal motivation, self-concept and the knowledge, skills and attitudes that foster enterprise and innovation in all kinds of endeavours, such as business ventures, community ventures, non-profit ventures. Skills included are:
 - creative thinking
 - goal setting
 - communicating
 - researching/organizing
 - decision making/problem solving
 - team building
 - managing
 - planning
- develop greater awareness of the role of business, entrepreneurship and intrapreneur-

ship in our society and the global economy

- translate change and challenge into a viable opportunity by identifying options, resources and sources of support.

MODULE LEARNER EXPECTATIONS

Module learner expectations are a refinement of those expressed in the general learner expectations. They are listed at the beginning of each module. There are eight modules organized into three levels.

Introductory Level Modules

This level is directed to students without any previous experience.

MODULE 1: CHALLENGE AND OPPORTUNITY

Theme: Getting the Idea
Status: Foundation

The student will:

- apply strategies and develop competencies in:
 - identifying opportunities
 - creating and generating ideas
 - establishing needs, wants and priorities
 - assessing alternatives
 - assessing environmental impact
- identify, compare and assess a variety of venture opportunities
- describe the process and components of a venture plan
- investigate career options where enterprise and innovation are particularly important.

MODULE 2: PLANNING A VENTURE

Theme: Preparing for Action
Status: Foundation

The student will:

- demonstrate qualities that initiate change:
 - initiative

MODULE 2: PLANNING A VENTURE**Theme: Preparing for Action****Status: Foundation***The student will:*

- demonstrate qualities that initiate change:
 - initiative
 - flexibility
 - leadership/team member
- apply personal goal-setting and problem-solving strategies that facilitate change effectively
- assess potential risks and propose strategies for assessing risks
- develop strategies for securing resources and support to implement a venture
- select, plan and assess a venture.

Intermediate Level Modules

This level is directed at students who can demonstrate the competencies outlined for the foundation modules.

MODULE 3: MAKING IT HAPPEN**Theme: Making It Happen****Status: Expansion***The student will:*

- implement a venture
- establish management procedures required to start the venture
- demonstrate leadership qualities in implementing the venture
- manage problem solving and decision making at each stage of the venture
- assess the venture.

MODULE 4: ANALYZING VENTURES**Theme: Preparing for Action****Status: Expansion***The student will:*

- describe and apply various methodologies for analyzing and evaluating ventures:
 - market analysis
 - industry analysis
 - financial analysis
 - human resources analysis
 - product/service evaluation
- analyze the research, compare a variety of ventures and make informed decisions about the feasibility of each venture
- provide a written critique of a venture.

MODULE 5: FINANCING VENTURES**Theme: Preparing for Action****Status: Expansion***The student will:*

- examine various sources of financing for ventures
- distinguish between short- and long-term financing
- analyze the advantages and disadvantages of financial options
- demonstrate the process of applying for different types of financing.

MODULE 6: MARKETING THE VENTURE**Theme: Making It Happen****Status: Expansion***The student will:*

- analyze various marketing strategies for their applicability in terms of marketing mix for a target market
- formulate and implement a marketing strategy for a particular venture
- appraise the strengths and weaknesses of the marketing strategy, and revise as necessary.

Advanced Level Modules

This level is directed at students who can demonstrate the exit level competencies of the intermediate level module "Making It Happen".

MODULE 7: MANAGING THE VENTURE

Theme: Making It Happen

Status: Expansion

The student will:

- manage the venture by performing the following functions:
 - planning
 - organizing
 - managing human resources
 - managing finances
 - monitoring
- establish management procedures necessary to implement the venture
- examine critical risks, and develop contingency procedures
- monitor the venture plan, and revise as necessary.

MODULE 8: EXPANDING THE VENTURE

Theme: Making It Happen

Status: Expansion

The student will:

- analyze the rationale for expanding a particular venture, taking into consideration:
 - personal criteria:
 - values
 - goals
 - expertise
 - economic criteria
 - financial considerations
 - social/ethical considerations
 - personal definition of a "successful" venture
- compare personal philosophy with venture goals
- evaluate the options available, and develop an expansion strategy. Analysis could include:
 - managing, financing, promotion strategies

- vertical or horizontal expansion
- diversification

- implement the expansion of a particular venture
- assess the elements of "success" (as personally defined) of the expanded venture.

SPECIFIC LEARNER EXPECTATIONS

Specific learner expectations for each module are identified within the Suggested Instructional Strategies and Activities section (see pp. 23-113).

ASSESSING STUDENT ACHIEVEMENT

In Enterprise and Innovation, as in all programs, student achievement must be assessed to:

- give feedback to students about their attainment of specific learning expectations and indicate areas for growth and improvement
- inform parents and guardians of their child's progress
- communicate to business, industry and post-secondary organizations the competencies students have developed
- determine the effectiveness of the instruction.

As an essential part of the learning process, assessment requires those responsible for the learning to:

- determine each student's present competence in the area
- determine the growth in learning which needs to occur in order for the student to meet the expectations outlined in the program of studies
- understand how the student learns most effectively
- establish a learning plan, preferably in consultation with the student, that clearly outlines the outcomes the student will be expected to achieve and the time and resources that will be available to the student.

In Enterprise and Innovation, assessing student achievement is particularly challenging. Students will enter the program with a wide range in background and level of competence. Also, the context of the ventures or projects they undertake can vary considerably.

Students are not only expected to produce a "product" (e.g., venture plans, reports), but are also expected to demonstrate their improvement or growth in the following areas of competence:

- creative thinking
- goal setting
- communicating
- researching/organizing
- decision making/problem solving
- team building
- managing
- planning.

The competencies listed above are integrated throughout all eight modules. As students proceed through the modules they are expected to demonstrate increasingly sophisticated applications of these basic competencies.

The competencies outlined in each module as "Module and Specific Learner Expectations" define WHAT the student is expected to learn. HOW WILL TEACHERS AND STUDENTS KNOW if the competency has been developed appropriately is described in Appendix A: Student Competency Checklists. These checklists outline the performance indicators that students are expected to demonstrate to meet the exit level requirements set for the module.

Note: This section of the teacher resource manual will be monitored over the 1992-1993 school year to ensure that the performance indicators are suitably challenging. In addition, a portfolio of exemplars of student work will be developed.

Effective assessment strategies will allow students opportunities to display their learnings and competency in a variety of ways (samples are provided in Appendix B):

- written tests
- self-evaluation (samples B1 to B4)
- peer evaluation (can be used in conjunction with self/teacher evaluation) (samples B5 to B11)
- teacher observations (anecdotal notes, videotapes)
- parent feedback
- verbal reports
- student portfolios (a collection of student processes and products, including oral, visual or written).

INSTRUCTIONAL STRATEGIES

Instructional strategies used in Enterprise and Innovation should encourage students to be enterprising and innovative, and to develop basic and transferable career skills. Students participate in a wide range of group and class activities with a practical business application as well as activities with a more general social and citizenship value.

Students need to be challenged as creators and creative problem solvers, to reason conceptually and to recognize that their dreams can become realities. Entrepreneurial individuals are inner directed, and students should be given full opportunity to develop confidence in their ability to be self-reliant, proactive individuals. Successful entrepreneurs and intrapreneurs are very good at identifying their strengths and weaknesses. They know how to build on their strengths and search out solutions to those areas where further growth is required.

The Enterprise and Innovation program is very flexible. It can be offered in a traditional classroom setting, or as an independent or personalized study course.

ENTERPRISING MODES OF TEACHING

The "enterprising approach" is the mode of learning recommended for the teacher or "facilitator" of Enterprise and Innovation. This places emphasis upon an "enterprise" style of learning that has students "learning by doing". Essentially, the teacher's role is that of guide and partner in the learning process. This approach focuses substantially upon recognizing the different ways in which people learn, understanding this learning process and facilitating it. The use of the "enterprising approach" involves the teacher moving away from the more "traditional" stance of being a subject-based expert, tightly in control of a learning process, and moving toward facilitation and learning by doing and discovering.

The instructional environment may be the classroom as well as the community. An "enterprising approach" will provide opportunities for students to experience and enhance their career goals. On the following pages are some suggestions to facilitate an "enterprising approach":

- activities and terms to support active learning
- strategies for using small groups effectively
- teaching for thinking.

FORMAL AND ENTERPRISING LEARNING MODES★

Formal	Enterprising
Learning from teacher alone Passive role as listener Learning from written texts Learning from "expert" frameworks of teacher Learning from feedback from one key person (the teacher) Learning in well organized, timetabled environment Learning without pressure of immediate goals Copying from others discouraged Mistakes feared Learning by rote	Learning from each other Learning by doing Learning from personal exchange and debate Learning by discovering (under guidance) Learning from reactions of many people Learning in flexible, informal environment Learning under pressure to achieve goals Learning by borrowing from others Mistakes learned from Learning by problem solving

★ Adapted from *The Enterprise Culture and Education: Understanding Enterprise Education and Its Links with Small Business, Entrepreneurship and Wider Educational Goals*, Durham University Business School, Professor Allan Gibb, March 1992.

SUGGESTED ACTIVITIES AND TERMS SUPPORTING "ACTIVE" LEARNING

Active learning is the process of learning through doing and reflecting on the process. The following terms and activities promote "active" learning.

Action Plan—A plan indicating what needs to be done next. Ideally, it will indicate by when, in what order, by whom and what will signal success. This is usually the output of a small group planning session related to some problem or opportunity and can be used to build on.

Active Listening—An important interpersonal skill needed by both teacher and students. It demands high levels of concentration, devoting attention to the speaker, avoiding interrupting, being receptive, listening actively rather than just hearing, noting messages in the tone of voice, choice of words and non-verbal behaviour, checking understanding of what is being said, asking for clarification, elaboration and specific examples, and reserving judgment.

Project—The activity through which students become involved. In Enterprise and Innovation it is a venture project. It may range from pair work through small group work to whole group activity. The activity might be preplanned or emerge from negotiation. All groups might be doing the same thing, or there might be a variety of tasks being pursued. Activity can be individual, but much of the educational value emerges through talking about it. Activity is when the students feel they are doing something rather than feeling something is being done to them.

Agenda—A list of things to be done, often prioritized. Ideally, the agenda is cooperatively developed and forms a meaningful basis for subsequent activity.

Atmosphere—If you are starting from scratch, it takes time to build the right atmosphere for active learning; trust, openness, flexibility, mutual respect, ground rules. The classroom climate should be friendly and non-threatening. Group members need acceptance, trust and security so they can contribute freely, without teacher or other pressure or censure.

Briefing—This is the preparation of a group for an activity. The brief may be verbal or written. It should clarify: WHAT will happen, WHY the activity is being done, WHEN it must be completed, and HOW to proceed. Overelaborate briefing is self-defeating. Insufficient briefing can cause problems. Less than 5 minutes should be a rule of thumb for short activities.

Catalyzing—Helping things happen. The odd casual question, or the curious "Why don't you try...?" Helping to get the essence of a problem, as an interested peer, or encouraging a promising idea. Sometimes catalyzing involves playing devil's advocate, or gently nudging someone to actually do something rather than talking about it. The judicious imposition or negotiation of tight deadlines often injects some urgency into activities.

Challenge—Sometimes active learning spills over to present a challenge to the status quo in other contexts, through students transferring their learning and practices: "Why can't we work on this in groups?", or "Why can't we do it this way?"

Compromise—The students and teacher can expect to compromise, not only through negotiation, but also because of organizational constraints. There will be some areas where there is no compromise (see **Ground Rules**).

Conflict—There may arise some conflict within a group during an activity, since the task often completely absorbs them. Resolution of the conflict should, as far as possible, be left to the group. Resolving conflict is a skill they should be encouraged to develop.

Debriefing—This process follows an activity and is intended to draw out or reinforce the learning. It can be done within small groups prompted by a few key questions, and then centrally for the whole class. It can be aided by having "process observers" who report back. It can be verbal or visual, it need not be "serious", it can be individual. Careful planning and structuring by the teacher can enable key questions to be addressed concerning the process, the learning and the students' concerns. It should not be left out. It should not be rushed through. It is important to allow sufficient time to reflect on

what has happened and what students have learned.

Suggestions for a Debriefing Session

1. Change the room/furniture at the end of the activity; e.g., after a production simulation based around tables, have the group form a big informal circle. This immediately alters the atmosphere and indicates a new phase in the exercise.
2. If the group is too large for debriefing as a whole, smaller groups will allow everyone an opportunity to share their feelings. A group facilitator should be selected for each small group.
3. Include time for debriefing when you plan the activity (up to one third of the available time).
4. Refer to role titles rather than personal names in discussion.
5. Ask open-ended questions.
 - How did you feel as manager/supervisor?
 - What happened to make you feel like that?
 - Why do you think you felt that way?
 - Who influenced what happened next?
 - What if . . . ?
6. Beware of being drawn into arguments about instructions or performances, as this session is concerned with the relationship between the exercise and the "real world". It is not concerned with evaluation of content, but with bringing students out of role through discussion of process.
7. Ask observers for their comments.
8. Analyze the behaviour observed and its causes.
 - Why did it happen that way?
 - How did it start/finish?
9. Conclude generally with a summary of the activity, the skills/knowledge involved, the process observed.

10. Any other adults involved should be included in the debriefing.

Disclosure—Act of giving a piece of personal information to someone else. Helps in building trust. Encourages openness about feelings. Can be structured into activities, but needs to be handled sensitively, with absolute discretion in an atmosphere of trust and confidentiality.

Discussion—Very important in active learning. It can be spontaneous and associated with the task, or structured as the task itself, or to follow a task. It can be in twos, threes, small groups or whole class. The essence of active learning is that students do things and talk about what they have done or are doing. The teacher should ideally say the least during a discussion. Try to involve everyone, do not let one person dominate, be flexible while trying to cover the key areas.

Empathizing—The interpersonal skill of being able to understand the feelings or motives of others.

Excitement—It is common for students to get excited when involved in a task, particularly if in competition with others. Active learning, and especially simulations, have an emotional dimension to them. This can lead to lots of noise and laughter, which can be misinterpreted by other staff members. If you can, invite them in—not to observe, but to participate.

Expertise—The kinds of expertise or skills needed to implement active learning strategies include the abilities to: devise, design and structure activities; monitor and facilitate the process of group dynamics; empathize; counsel and actively listen; demonstrate flexibility and creativity when responding and negotiating; plan and execute debriefing.

Facilitator—The person responsible for the group working together. The role of the facilitator is to enable the group to make progress. Techniques to make this possible are part of the experience of a good facilitator. The art of using an "icebreaker" to help a new group to get to know each other; or recognizing a "red herring", which might deflect the energies of the groups from the real task; knowing when to summarize the progress so far in order to focus the group on the way forward—these are "facilitating" strategies.

It is important that a facilitator be constantly alert to the needs of the group, and responds whenever and wherever appropriate, without becoming dominant or dictatorial.

Ground Rules—An explicit, negotiated and accepted code of expectations. Ideally, upheld through peer group pressure. Content is negotiated but might cover such things as safety, attendance, respect for others.

Group Dynamics—The social processes that groups go through over time in different circumstances. It is very important to have an understanding of how people function in small group contexts, and how different situations can be identified/anticipated and exploited/averted.

Grouping—There is a special skill in choosing or negotiating how many small groups there will be and the composition of each group.

Icebreaker—An activity that facilitates a group of individuals to feel comfortable together—especially with a new group—characterized by a lot of mixing and laughter. Sometimes called a “warm up”, it can also be used to revive a sluggish class.

Idea Ownership—The pride felt by a student or group for an idea that they, themselves, have generated. Encourages psychological commitment by the individual or group.

Interpersonal Skills—Active learning demands the employment of interpersonal skills and, indeed, activities can be exclusively aimed at their development. Some interpersonal “skills” that are important in active learning are: empathizing, assertiveness, active learning, self-confidence, self-awareness, building trust, leadership, negotiation and non-verbal communication.

Laughter—This is much more common and genuine in active learning situations. It signals enjoyment, group cohesion or relief. It tends to add to the noise level.

Learning Opportunities—Natural intervention points where the teacher can reinforce, elaborate or explore with an individual, a small group or the whole class, some aspect arising from the task at hand. Has spontaneity and relevance, lacks artificiality. It may not need the teacher. An

active learning approach is to carefully structure a series of activities/experiences during which many learning opportunities will occur—some of them broadly predictable, others not. Teachers and students need to be flexible and opportunistic.

Motivation—Students cannot be coerced into active learning. It relies to a great extent on their wanting to do it. Reasons why they actually do participate include: idea ownership, choice, responsibility, team spirit, group loyalty, interest, and because “it’s different from normal lessons”. This underlines the importance of: building on their interests, enabling them to negotiate what they do and how, giving them the opportunity to work in small groups and giving them ownership and responsibility for their learning.

Negotiation—Reaching mutually acceptable agreement on matters like what to do next, how to do it, how much time is available, what would be a successful outcome, who to do it with. Negotiation occurs between teachers and students and among the students themselves. It is improved with practice.

Observer—A person who volunteers to observe a group absorbed in a task, and then report back on the process the group went through. Usually aided by a written brief or checklist, this is particularly useful in debriefing simulations (see **Process Observer**).

Process Observer—The activities within a group are the result of interaction between individuals and may be noted for future discussion by a group observer who focuses on that interaction and its consequences. In observing the group processes, an attempt is made to identify the methods used by a group to achieve its goals. Feedback from process observation allows a group to examine the way it is working, and to explore ways of improving the strategies used to achieve its goals.

Suggested Brief for a Process Observer

- How did the group begin the task?
- Was a leader appointed? If so, by whom?
- Was a method of appointment used? If not, did a leader emerge?
- How were decisions reached? (If none, why not?)

- Was there negotiation? Confrontation? Cooperation? Consensus? Majority rule?
- Who spoke most? Least?
- Was anyone ignored? Omitted?

Note:

- Always negotiate your presence with the group to be observed.
- Always ask the group if they want feedback from you, and give it only when it is wanted.
- Feedback must support the facts with quotes of what was said and who said it. It should not be judgmental.

Suggested Checklist for a Process Observer

- Group size?
- Leader?
- How did the group start the exercise?
- Decisions? If not, why not?
- Negotiation? With whom? What for?
- Confrontation? With whom? What for?
- Cooperation? With whom? For what?
- Consensus? With whom? For what?

Reflecting—The process of looking back over the recently experienced activity, or part of an activity, to draw out/reinforce the learning. It can be solitary or in a group, structured or unstructured, immediate or eventual.

Role Play—A situation (sometimes briefed, sometimes loose, sometimes issue-focused, sometimes open) that enables students to develop empathy, negotiating skills, active learning and self-confidence.

Seating—It is unlikely that rows of desks are appropriate for active learning. Alternatives include a circle, small circles, a horseshoe, pairs facing each other, workstations. Sometimes a task is desirable inside a circle. Ideally, a room will have sufficient space to allow flexible seating arrangements.

Sensitivity—Sensitivity to individuals and groups through process observation, active listening and empathizing is much more necessary with active learning than in conventional teaching.

Simulation—A structured learning experience that emulates a real situation by designing in key features, processes and operating procedures. It can vary in length, complexity, flexibility and

numbers being catered to. The participants' achievements in a simulation are influenced by predetermined key criteria. Some degree of role playing is generally necessary. Emphasis may be toward process or toward content.

Teaching Style—In active learning the teacher's role is not that of an autocratic expert, but rather one of guide, facilitator, mentor, catalyst, friend, collaborator. This demands a style that is democratic, highly participative, friendly, open and relaxed.

Developing Venture Projects—Venture projects give students the opportunity to demonstrate their creative thinking skills and their ability to be entrepreneurial/intrapreneurial. This does not mean that students must go out and start their own businesses. The resources of the students, teachers and community will be critical factors in determining the exact nature of the ventures students adopt; however, the options are limited only by the imaginations of those involved.

Whether the students work independently or on their own projects, in small groups, or as a class is entirely up to the students and the teacher. If the school offers all levels of the program in a traditional class setting, it may be feasible for students in the introductory levels of the course to work on a class venture, whereas the intermediate and advanced level students could develop individual or small group ventures. Individual students or small groups of students could investigate various venture possibilities, and report their findings to the class as a whole. The class could then assess each proposal and decide upon the venture to be undertaken.

Venture projects may take many forms. Students need to be encouraged to think about and investigate ventures that explore and develop their interests and abilities. As part of this process, students should prepare a venture proposal (see Venture Proposal Guide, Appendix B14).

Following discussion with the teacher, the student should be prepared to assess the plan and revise or proceed accordingly. It is important to allow students to try a variety of venture projects until they find the one that is best suited to themselves and their current situation. The time target for initial activity may take approximately 5 to 10

hours, while the time for the venture project itself will vary according to its complexity.

A key consideration for the first venture attempted by the students is simplicity. At this beginning level the purpose of the venture is to develop venture planning skills, as well as a clear understanding of the components of venture plans. Consequently, it may be best to focus on school-based ventures (either profit or non-profit), which can be planned and executed successfully within a reasonably short time frame. Students will then have the basic skills and confidence to attempt other, more individual and complex venture projects. Ventures can take many forms. For example, students might:

- establish a business venture
- establish a volunteer, community or service program
- plan, market and manage an event or a conference
- produce, market and distribute a book or video.

SMALL GROUP LEARNING★

Small group learning is a good way to promote active learning and encourage individual and group enterprise. Small group learning increases flexibility and helps students adopt more independent and responsible learning methods and become more self-disciplined. With small groups, students can become active participants in the classroom, and more motivated to achieve. The purpose of small group learning is to share information, solve problems, make decisions or help each other learn content or processes.

Tips for Using Small Groups

- Use groups of four to eight students.
- Provide space with proper furniture and good acoustics.
- Make sure that group leaders fully understand their role.

- Make sure that group members fully understand their role.
- Brief the students to clarify: WHAT will happen, WHY the activity is being done, WHEN it must be completed, and HOW to proceed.
- The topic should stimulate thinking and help students realize that any number of "correct answers" and a variety of legitimate viewpoints can exist.
- Give students clear objectives. What is the purpose? (You may wish to have students define the objectives.)
- The classroom climate should be friendly and non-threatening. Group members need acceptance, trust and security so that they can contribute freely, without teacher or other pressure or censure.

Kinds of Small Groups

Depending on what is to be done—what the topic or task is for the students—there are different types of small groups that can be used.

Discussion Group

- A discussion group encourages students to become involved with their peers. It recognizes the importance of being able to work with others.
- The teacher must provide students with sufficient background information for the discussion of a clear understanding of the objectives.
- This is a good way to handle classroom, community or national issues.

Brainstorming Group

- Brainstorming is a fun way to encourage creative thinking and problem solving.
- It stimulates an individual student's participation and is non-threatening, so it can draw out shy students.
- Students, in a set time, are asked to come up with as many ideas or suggestions on a topic as they can.

★ Pages 14 to 18 have been adapted from *Project Real World*, Federal/Provincial Consumer Education and Plain Language Task Force, 1991. Used with permission.

- Quantity of ideas is desired, freewheeling is effective and "hitchhiking" on their group or individual ideas is permitted.
- Judgment is deferred until the end, and criticism is not allowed.
- This is a good way to introduce students to other small group work.

Buzz Group

- Small clusters (four to seven students) are grouped for a short time (5 to 10 minutes) to seek the solution to an issue or problem.
- A recorder and leader are chosen quickly in each group.
- Alternatives to the issue are sought. The pros and cons of these are considered, agreement is sought, and one of several correct alternatives is selected.
- Teachers can use buzz groups on many occasions in the classroom. For example, when an issue is raised during a lesson, you can announce a buzz group session to explore it.

Think-Pair-Share Group

- This method extends students' thinking and interaction.
- The teacher begins with a short presentation on the topic. To encourage students to consider more fully what was explained, the teacher poses one question and asks students to spend a minute or two alone thinking about the issue.
- Students are then assigned in pairs to share what they were thinking. One student makes a statement, and the other must paraphrase it until the position of the student who made the original statement is clearly understood. This is followed by a reversal of the statement-maker and paraphraser roles.
- Students (pairs) then report back to the whole group or other pairs.

Problem-solving Group

- Group members, in a systematic way, seek the solution to a problem.
- Problem-solving groups are based on the "Scientific Method". The steps are:
 - problem definition
 - brainstorm the likely causes of the problem

- decide the most likely cause
- brainstorm potential solutions
- select the most likely solution (based on determination of pros and cons of alternatives)
- decide when and how to implement the solution.

Tutorial Group

- Tutorial groups are set up to assist students who need help or additional practice, or for students who can benefit from enrichment.
- A tutorial group is led by the teacher or by a student.
- Greater attention to individual needs is possible, and students can participate more actively when tutorial groups are used.

Laboratory Group/Investigative Group

- A laboratory group is formed to complete a project, do an experiment, or practise something that has been presented by the teacher.
- A common example is a chemistry laboratory group.

Role-playing Group

- In a role-playing group, each group member is assigned a role to assume on a controversial topic.
- Students may or may not agree with the stance they have been given to present or defend.
- A role-playing group can bring out all sides of an issue, or help students learn to understand the ideas or feelings of others.

One-Three-Six Group

- The one-three-six group method can be used at almost any time during a lesson.
- Students are asked, as individuals, to record their opinion on an issue. Then each student is asked to join two other students (form groups of three) and come to an agreement.
- Two groups of three join and seek consensus.

Panel, Committee, Symposium, Forum, Dialogue and Round Table

- Rather than the teacher presenting information and ideas through lectures, assigned questions or readings, students can play an active part in their learning.
- This can be done by setting up a:
 - **panel:** a group of students discuss a topic before the class—chaired by either the teacher or a student
 - **committee:** a group of students learn about a topic and report
 - **symposium:** several students become "experts" in a topic, and give brief presentations to the class
 - **forum:** a class discussion in which a problem is explored through questions and answers and short statements, under the guidance of a chairperson
 - **dialogue:** two people discuss a topic in front of the class
 - **round table:** a group of students discuss a specific topic or issue for a set length of time (approximately 10–15 minutes). A moderator and/or recorder may be identified to focus and/or summarize discussion.
- Students find these methods motivating. The teacher can provide a summary to ensure that content is organized, correctly understood and that it links to what is being studied.

The Teacher's Role in Small Groups

- Communicate objectives, select the topic or assignment, and ensure the task is understood.
- Decide the size of the groups.
- Assign the students to groups.
- See that the room is arranged to accommodate group work.
- Provide appropriate materials.
- Set the time for completion of the task.
- Inform the group of the behaviour expected, and teach interpersonal and group skills.
- Act as a resource person and monitor.
- Intervene, as necessary, to solve problems or to teach group skills.
- See that group effectiveness is monitored.
- Evaluate the product of the group and the individuals in it.

- Encourage a classroom climate that is non-threatening and friendly.

The Students' Role in Small Groups (Stanford and Rourke, 1974)

- **Initiator**—gets discussion underway, helps the group organize and keeps it moving toward the goal.
- **Contributor**—offers opinions, facts, anecdotes, or examples that could help the group solve the problem.
- **Clarifier**—helps make sure that the terms, the problem and contributions by group members are understood by all. If needed, the clarifier suggests that added information be sought.
- **Summarizer**—helps keep discussion relevant and to the point by bringing together and summarizing what has been discussed or learned to date. The summarizer also makes sure that everybody in the group understands where the group stands on an issue.
- **Evaluator**—keeps track of how well the group is progressing in its task and tactfully points out problems the group is having in working together.
- **Encourager**—facilitates participation by listening carefully, being friendly, complimenting members for their contributions and inviting participation.
- **Harmonizer**—is the peacekeeper, the "one who throws oil on troubled waters" by relieving tension (perhaps through humour), settling disputes, helping the group work out disagreements and suggesting compromises.

Characteristics of Effective Group Members

Team members are to:

- be on time and attend all group sessions
- take an active part, and contribute information and ideas
- contribute to group maintenance
- have a positive, rather than negative or critical, approach
- listen when others speak, be empathetic and hear others out
- respect and interact with other members
- respect individual differences
- avoid prejudice and keep biases out
- seek, and be open to, the ideas and suggestions of others
- encourage non-contributors to take part

- accept responsibility for the consequences of their behaviour
- be sensitive to the feelings and concerns of others
- avoid self-serving, judgmental, blaming, grandstanding or storytelling behaviour
- be genuine and open
- support others, and help them articulate their ideas
- help the group by summarizing, clarifying, mediating, praising and encouraging
- use problem-solving, decision-making and conflict resolution frames of reference
- act as group leader, recorder or group effectiveness monitor, as appropriate.

Group leaders are to:

- see that the "problem" is clarified
- get discussion started
- keep discussion moving
- see that all phases of the problem are brought out
- keep discussion on topic
- encourage full participation and draw out "non-talkers"
- be objective
- rephrase, clarify statements, or have others do this
- see that summaries or conclusions are made
- see that all members are treated with respect
- respect the confidence of the group
- report, or see that the thoughts of the group are fairly reported.

Participants are to:

- contribute a reasonable quantity of ideas and experiences
- keep prejudices out (at the very least, recognize them as such)
- keep on topic
- avoid "storytelling" and engaging in long, drawn-out arguments
- avoid making speeches to show off
- help phrase ideas and statements
- show respect for the ideas and opinions of others
- confine the argument to ideas and not engage in personal attacks
- help make summaries and reach a conclusion
- act as recorder or discussion evaluator as assigned.

Advantages of Using Small Groups

- **Increased resources.** "Two heads are better than one." A group has access to more information and has a broader background than does an individual. More insights are likely to occur. A group can create more ideas.
- **Members are often stimulated by others.** Members may be motivated to help the group succeed for social approval reasons. "Ideas beget ideas." "Hitchhiking" occurs (i.e., what one person thinks of or says may prompt an idea in another person, or a suggestion by one person may be improved or extended by another).
- **Better decisions can result.** Groups can produce better decisions than students working separately. Ideas can be clarified, refined, combined and evaluated through the interaction of group members; therefore, decisions should be superior.
- **Group members may have a stronger commitment.** If group members help hammer something out, they tend to feel a stronger commitment to accept the result and follow through.
- **Students are more actively involved.** Participation is more likely to be active rather than passive. This increases motivation, participation, learning, retention and commitment.
- **Personal and social learning take place.** Increased understanding of self, others and group processes can result. Interpersonal and social skills can be improved, and an increased self-concept can result. Prejudices can be reduced. Students gain insights into the attitudes, reactions and sensitivities of others and may examine and modify their behaviour. Ability to contribute rationally and constructively can be improved.
- **Peer teaching is advantageous.** Studies confirm that peer teaching is powerful. Some things are learned better and faster when taught by peers. Ideas are put in "student language" rather than "teacher language", examples and explanations used by peers are

often more relevant to students than teacher or text examples.

- **Learning may be deepened.** Frequently, material is easily forgotten since it is often just memorized and not really understood when direct teaching methods are used. When small groups are used, it is more likely that students will understand the thinking skills or processes involved. When this occurs, learning is more likely to be transferred to new situations.

Limitations of Using Small Groups

- **Group decision making takes time.** More time is required for decision making or planning when it is done by a group than when it is done by an individual. The views of all must be heard, and disagreements may occur which take time to resolve. More material may be covered through methods, such as lectures.
- **Time may be seen to be wasted.** Discussions, if not well conducted, not only take time, they can waste it. Without able guidance or the use of group skills, discussion can wander or be misled, concerned with trivia or lack of conclusiveness.
- **Convictions may be suppressed.** Some members may conform just to avoid confrontation or to risk censure. Less aggressive students may not be given a chance to present their ideas.
- **Some tasks are better done by individuals.** Routine or simple tasks, or information acquisition may be better done by individuals.
- **Talk may be substituted for action.** "Visiting" may take precedence over productivity. In some situations, groups may tend to be indecisive since no one person is solely responsible for action. One or two individuals may do all the work, and other members may merely "ride on their coattails".

Most of these disadvantages can be overcome by effective use of the small group teaching method. This, of course, requires careful planning, instruction and monitoring.

Assessing Small Group Effectiveness

You can tell if a group is doing well. The climate is positive, people are on task and seem to be enjoying themselves. Everybody seems involved and discussion does not "drag".

You can assess how well a group is doing by asking key questions. These can form the basis for making the group more effective. You can ask yourself why a particular pattern or behaviour occurs, and what you can do about it (see Group Effectiveness Appraisal Form in Appendix B).

- **Influence and Leadership**
 - Does anybody seem left out?
 - Does somebody dominate?
 - Is there rivalry?
- **Communication**
 - Who do people look at when they talk?
 - Who talks to whom? How long? Who interrupts?
 - Are there subgroups (cliques)?
 - What is the style (questions, gestures, statements, tone of voice)?
- **Decision Making**
 - How are decisions made? Consensus? Voting?
 - How do members react to the decisions made?
- **Atmosphere**
 - Is the climate happy? Tense? Apathetic?
 - Does the group stay on topic?
 - Are efforts made to include and respect all?

TEACHING FOR THINKING★

Why Teach Thinking Skills in Enterprise and Innovation?

- Recent research suggests that students can become more proficient at complex tasks when explicit teaching of thinking skills is presented.
- Technological advances have created job opportunities that will require students to use critical, creative and problem-solving thinking skills on a regular basis.
- Explicit teaching of thinking skills allows students to be more active participants in the learning process.

Supportive Teacher Practices

Teachers can foster thinking skill development by modelling their own thinking skills and techniques for students, asking questions that require more than recall skills, and reacting to students' responses in a positive manner. Examples of these teacher practices are as follows.

Modelled Thinking

- listen carefully to students' responses
- talk through problem solving with students
- share how goals can be set, problems defined or actions taken
- discuss how to proceed on a problem, what to do when information is lacking
- demonstrate graphic organizers and other techniques used to organize and remember information.

Asking Questions

The power of effective questioning was demonstrated historically by Socrates. Socrates' strategy has been amply supported by subsequent research; the end result being that the more open-ended the question the more the learner is challenged to greater creative thinking.

A contemporary example of effective questioning is that of the hierarchy of education objectives developed by Benjamin Bloom. Bloom's taxonomy begins with simple recall questions and moves toward questions that probe students' understanding and require complex thinking skills. Bloom's categories are described below with sample questions.

- Knowledge—Identification of information:
 - Describe . . .
 - List . . .
 - Who? What? Where? When? . . .
 - Recall everything you associate with . . .
- Comprehension—Organization and selection of ideas:
 - Explain . . . in your own words.
 - Summarize the main idea of . . .
 - Define . . .
- Application—Use of facts, ideas and principles:
 - Demonstrate the use of . . .
 - Interview . . . about . . .
 - How is . . . an example of . . . ?
 - How is . . . related to . . . ?
- Analysis—Breaking information into component parts:
 - Examine . . . for similarities and differences.
 - Classify . . . according to . . .
 - Differentiate . . . from . . .
 - Outline/diagram/web . . .
 - What assumptions are necessary for . . . to be true?
 - What distinguishes . . . from . . . ?
- Synthesis—Restructuring information to create new ideas and concepts:
 - Create/design . . . to do . . .
 - Use the technique of . . . to . . .
 - What would happen if you combined . . . ?
 - Devise a solution for . . .
 - Develop a plan to . . .
 - Develop a theory to account for . . . and . . .
 - If . . . is true then . . . might be true.
 - Modify . . . to . . .
 - Extend ideas on . . . to . . .

★ Pages 19 to 21 have been adapted from *Teaching Thinking: Enhancing Learning*, Alberta Education, Curriculum Branch, 1990.

- Evaluation—Formulating judgments, opinions or decisions based on criteria or standards:
 - How do you feel about . . . as opposed to . . . ?
 - . . . is right because . . .
 - The . . . evidence supports . . .
 - Do you agree with . . . ?
 - Prioritize . . . according to . . .
 - What criteria would you use to assess . . . ?
 - I recommend . . . because . . .
 - What is the most important . . . ?
 - Is . . . consistent with . . . ?
 - Justify . . .

Another important aspect of asking questions is the manner in which they are posed. For example, pausing before reacting to responses allows students to reflect on their answers. Once a student has decided to respond, it is important that time be provided for a complete answer. Conversely, if a question is posed to a particular student there should be time provided for the student to reflect on a possible response or to decline the question.

Responding to Students' Answers

A classroom atmosphere that encourages students' responses is one free of criticism, sarcasm or other negativism. Students need to feel confident enough to "risk" being incorrect, or to try a new approach to a problem. Some of the ways in which teachers can demonstrate acceptance of students' responses are:

- Acknowledging—the response without a value judgment. For example, "I understand what you said . . ." or "That's an interesting possibility . . ."
- Paraphrasing—what the student has said by rewording, extending or attempting to clarify the student's response. Some examples are: "What do you mean when you say these two ideas are connected? Bill's idea is that we classify businesses according to type of ownership. How does this compare with Kim's idea?"
- Providing Information—to the student. Usually this is in the form of direct positive reinforcement, such as "Good thinking!" "Any other ideas?" "Yes, you're on the right

track . . ." "There's a book in the library you might want to read." "That reminds me of . . ."

Roles of Teachers and Students

Teacher strategies can assist students in becoming more autonomous learners. Common teaching techniques can be grouped into four strategy categories:

- director
- mediator
- generator
- collaborator.

When **directive** teaching is used, the teacher sets the goals, explains the rules or procedure, and demonstrates the skills and conditions for student success. Students learn mainly by imitating skills and methods. Directive teaching is often used to teach basic skills.

When the teacher uses a **mediator** approach, the goals are set by the teacher, and students determine means and methods of reaching that goal. The teacher acts as a guide to student learning and supports students in their search for goal attainment. This strategy is useful when wanting students to discover a particular concept.

A **generator** strategy requires the teacher and students to determine a common goal and establish ways to organize information needed to attain the goal. Brainstorming, visualizing and patterning skills are required to help students create methods of reaching the desired goal.

A **collaborator** role uses the combined thinking of several persons in the attainment of a goal. The goal may be established by the teacher or the group, but the key is student cooperation.

When students begin to think about their thinking, they are engaged in metacognition. Several strategies can be used to assist students in this process.

- **Skill Planning:** Students need time to discuss attributes, steps, rules of use or variations of a skill; e.g., a discussion of how brainstorming works, when it is useful, variations of use (individual or group).

- **Predicting Content:** Students predict the content of a given unit of study; e.g., "What questions should be asked and answered once I have participated in a field trip to a factory/business/career fair?"
- **Being Conscious of Constant Decision Making:** Students plan and evaluate decisions they have made.

Creating a Climate for Thinking

The following conditions are essential building blocks in the provision of an environment that facilitates and encourages thinking.

- **Openness**—joy and respect for unusual ideas, unique responses and outlandish questions; encouragement of original thought.
- **Stimulation**—discussion of paradoxes, problems and dilemmas; opportunity to collaborate and resolve issues and problems; use of enriching resources that stimulate inquiry.
- **Time**—reflection and pondering on ideas; experimentation with "wait" time; allowance to make mistakes and take risks; opportunity to examine and reflect on the processes of one's own thinking.
- **Freedom**—opportunity to predict and suppose, pose and explore possibilities; in-depth investigation of topics that involve many areas of study; sharing of new ideas and points of view.
- **Questioning**—posing open-ended questions; examination of problems with no answers; exchange of teacher and student roles; general spirit of inquiry.
- **Modelling**—exposure to good thinking strategies; involvement in group thinking; sharing the thoughts of great thinkers.
- **Self-direction**—student input into learning experiences; making choices and decisions.

Suggested Activities for Teaching Thinking Skills

Once the teacher has decided to teach thinking skills explicitly, the first concern is likely "Where do we begin?" Although there is no one best way, a useful beginning is to encourage students to reflect on their present thinking behaviours and areas where they could improve. This reflective thinking provides direction about the types of tasks that students find either pleasurable or onerous. Having this information before finalizing a plan for a given module of the program will allow teachers to include areas of strength (begin with) and move to areas where students perceive they are weak. The types of activities chosen for a particular module can also enhance the students' present skill levels while moving them toward activities where they will be required to "risk" more in creating solutions and meeting new goals.

Establishing Internal Standards

Students can be asked to identify particulars of things they have done well; e.g., ask for feedback from peers on their participation in a group project, or students can reflect on their own participation and compare their responses to those of others (see Student Thinking Reflection Form, Appendix B5). The goal is to make students aware of where they are strong and where they need to improve (see Project Worksheet, Appendix B12 and Project Planning, Appendix B13).

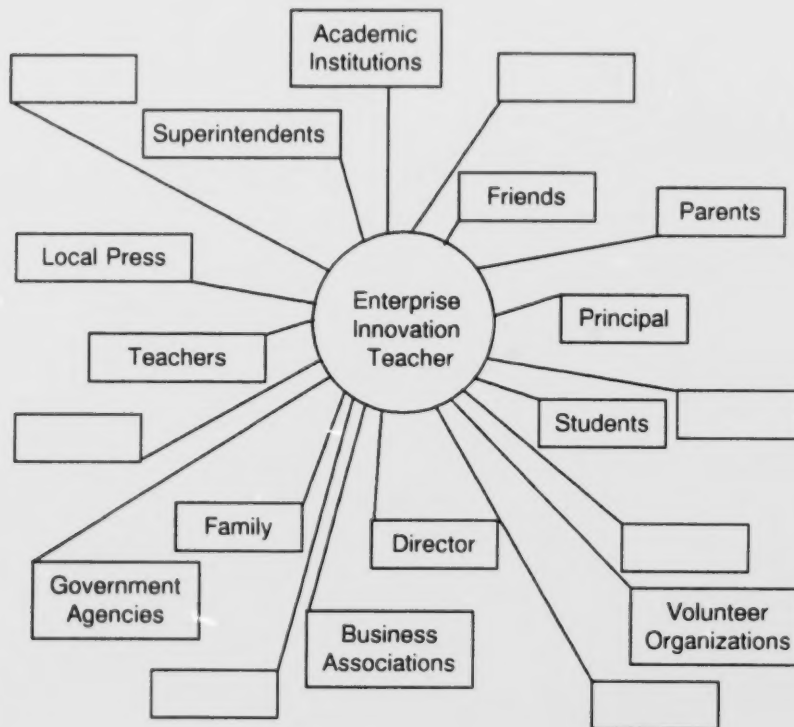
BUILDING A SUPPORT NETWORK

Teachers are encouraged to establish local support networks to help meet the needs of the students in Enterprise and Innovation. For example:

- In-school support networks could include school counsellors, administrators, teacher-librarians, other teachers, office managers.
- Community-based support networks can be particularly effective. For example, cooperative teaching, with community

incubator centres, offers clients an entrepreneurial environment conducive to the start-up and growth of new firms. This environment usually includes services, business counselling and entrepreneurship education. The involvement of business/industry and community representatives on advisory committees as well as inviting them to be mentors, project plan reviewers or guest speakers helps ensure the program is relevant and credible.

ENTERPRISE AND INNOVATION SUPPORT NETWORK★



A network is a cluster of like-minded people who share a common interest or need. It operates as a self-help group. Its members communicate openly to share their knowledge and expertise. A network may include those who are paid specifically for what they contribute most often, members of the network share their expertise freely.

★ Adapted from *Entrepreneurship for Canadians: The Spirit of Adventure*, Toronto, ON: Canadian Foundation for Economic Education, 1989, pp. 168-177.

SUGGESTED INSTRUCTIONAL STRATEGIES AND ACTIVITIES

MODULE 1: CHALLENGE AND OPPORTUNITY

Theme: Getting the Idea

Status: Foundation (Introductory Level)

The student will:

- apply strategies and develop competencies in:
 - identifying opportunities
 - creating and generating ideas
 - establishing needs, wants and priorities
 - assessing alternatives
 - assessing environmental impact
- identify, compare and assess a variety of venture opportunities
- describe the process and components of a venture plan
- investigate career options where enterprise and innovation are particularly important.

MODULE OVERVIEW

Enterprising and innovative individuals are self-directed agents of change. They recognize opportunities and mobilize resources to meet society's needs in creative, new and innovative ways.

This module introduces students to the skills of enterprising and innovative individuals. They assess themselves and are challenged to expand their repertoire of skills as innovators and leaders of change. They recognize and become confident that these skills will help them succeed in any career they choose.

Students examine entrepreneurship as a career alternative and understand the business environment and opportunities it provides enterprising individuals. They examine and appreciate the importance of careful, complete and proper planning for success. As is the case with accidents . . . **SUCCESSFUL VENTURES DON'T JUST HAPPEN, THEY ARE CAUSED . . .** by careful planning.

Key to "Resources" Column

See Print and Audio-visual section for full bibliographic annotation. Bold numbers correspond with resources in this list. Ch. = Chapter; BLM = Blackline Master; TM = Teacher's Manual.

MODULE EVALUATION STRATEGIES

This module focuses on the development of enterprising and innovative skills. Evaluation strategies should reflect the delivery strategies used to enhance creativity, teamwork, leadership and self-awareness. Evaluation could be based on participation, group dynamics, presentations, bulletin boards, creativity journals and problem solving. Formal evaluation using knowledge-based tasks and assignments should not be emphasized. Students should be encouraged to complete self-evaluations throughout this module.

MODULE 1: CHALLENGE AND OPPORTUNITY

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Recognizing and Assessing Opportunity	<i>The student will:</i> • compile a list of opportunities (needs, wants and problems) • develop and apply a decision-making model for potential entrepreneurial opportunities • expand repertoire of thinking skills: – problem solving – decision making.	Ch. 8-9 Case Studies 183, 195, 224 BLM 27, 28	Ch. 4 Ch. 5 Ch. 3-5	Ch. 5, pp. 88-89; TM p. 46; Ch. 8, pp. 163-164; TM pp. 74-79 Ch. 7, pp. 135-140; TM pp. 63-64; TM pp. 70-71; Ch. 8, pp. 150-153; TM pp. 73, 78-79	

Suggested Instructional Strategies and Learning Activities	Support Network
• Complete Program No. 1 from Resource 16, <i>Entrepreneurship for Canadians: The Spirit of Adventure</i> kit. Follow and/or modify the suggested procedure in the accompanying user's guide. • Students maintain a BUG JOURNAL or SCRAPBOOK to identify anything that causes inconvenience, annoyance or hardship. Students should be encouraged to survey parents, siblings and others in their community who represent different demographic groups. Each day a specified amount of time can be spent generating ideas to improve or solve one or more items from the bug list. Encourage students to identify creative ways to deal with their own daily tasks, such as note-taking, studying and time management. • Create a TRENDS bulletin board in the classroom. Students are responsible for monitoring local, regional, national and international events that may help the class identify changes and trends in the world around them. Each student is responsible for submitting and presenting one item per week. They could use newspapers, magazines, television reports, or interviews they may have conducted personally. Items submitted and presented should be appropriately displayed on the TRENDS board. • Complete Program No. 3 from Resource 16, <i>Entrepreneurship for Canadians: The Spirit of Adventure</i> kit.	• Survey the school and/or the community. Identify the types of services offered and who provides them. Discuss why these services are in demand. Survey the citizens and businesses to determine their bug list. Include these items in class idea generation activities. • Invite local entrepreneurs to class to discuss the need for and factors used to assess opportunities and ideas.

MODULE 1: CHALLENGE AND OPPORTUNITY (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Generating Ideas	<i>The student will:</i>				
	• develop skills in generating ideas, alternatives and strategies	Ch. 10	Ch. 3	Ch. 8, pp. 150–153; TM pp. 73, 78–79	
	• assess personal preferences in thinking strategies	Ch. 11	Ch. 3		
	• outline conditions needed to promote idea generation and change initiation	Case Studies 236, 262, 268	Ch. 3	Ch. 8, pp. 150–153; TM pp. 73, 78–79	7
	• discuss “failure” as an opportunity to learn		Ch. 12	Ch. 10, pp. 194–196; TM p. 92	
	• be sensitive to and respectful of the perspectives, needs, wants and priorities of others		Ch. 12		
	• demonstrate characteristics of creative thinking.	BLM 26	Ch. 3	Ch. 8, pp. 163–164	41 Unit 3

Suggested Instructional Strategies and Learning Activities	Support Network
• Show Resource 7, <i>Paradigms: Discovering the Future</i> and/or Resource 8, <i>Power of Vision</i> videos. Identify the importance of change to the progress and development of our world today. Discuss the impact that revolutionary ideas have had on our lives. Identify as many examples as possible. • Brainstorm areas of the community, society, country or world that could benefit from positive change. Divide the class into small groups, and have each group come up with as many ideas as possible to change the identified areas. Have groups share their solutions with the class. The classroom atmosphere should be such that the ideas are not judged as good or bad. Place emphasis on the generation of as many ideas as possible. • Discuss and identify various methods for promoting the generation of ideas. • Pose the question "What is creativity?" Allow a few minutes for each student to form a response. Ask students to share responses with the class. List all responses on the board. Focus discussion toward the understanding that creativity is all these things because it is expressed in different ways by different people. Ask students to provide examples of creativity. Divide the class into small groups. Provide each group with a problem to approach. The groups then generate as many different solutions to the problems as possible. • Examine the benefits of creativity to individuals, organizations and societies. Students could create caricatures on poster paper illustrating their responses. • Brainstorm and prepare a class list of the elements necessary to promote creativity or creative thinking. In small groups, students generate ideas that provide an atmosphere of creativity and respect in the classroom. Groups should be encouraged to present their ideas, using role play, rap music, skits, etc.	

MODULE 1: CHALLENGE AND OPPORTUNITY (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Planning a Venture	The student will: • compare various means of entering business: - start a new business - purchase a business - purchase a franchise - multilevel marketing • identify non-profit ventures • describe the process of creating a venture plan: - rationale - goals/objectives - research - resources - market analysis - risk assessment - financial analysis - success strategy • describe the important components of a venture plan: - description/objectives - market research and analysis - marketing plan - production/service plan - financial plan - human resources/organizational plan	Ch. 13-14 BLM 37	Ch. 11 Ch. 1 Ch. 6 Ch. 6	Ch. 11, pp. 224-227; TM pp. 103-106; Ch. 12, pp. 242-243; TM pp. 113, 117 Ch. 17, pp. 341-356; TM pp. 156-161 Ch. 17, pp. 341-356; TM pp. 156-161	16 Unit 4 and pp. 151-155 26 Ch. 6

Suggested Instructional Strategies and Learning Activities	Support Network
• Brainstorm a list of non-profit ventures taking place in the local community. Generate a list of as many non-profit ventures as possible that could be done in the school or the community. • Divide the class into small groups. Each group has one of the elements identified as part of a venture plan, and prepares and gives a presentation to their classmates about the element. Contributions could also be made to a VENTURE PLAN bulletin board.	• Invite a local entrepreneur and/or banker to discuss the importance of planning for success and the essential elements in any successful venture plan.

MODULE 1: CHALLENGE AND OPPORTUNITY (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Planning a Venture (continued)	• discuss regulations and social responsibilities that limit venture alternatives: - legal - social - ethical - environmental - cultural - political - economical.	Ch. 6, 12 Case Studies 139, 283 BLM 33, 38	Ch. 1	Ch. 3, pp. 56-66; TM pp. 22-25	
Assessing a Venture	<i>The student will:</i> • consider criteria for assessing the feasibility of ideas and strategies • analyze the components of a successful marketing strategy • apply feasibility criteria to venture alternatives • prepare a feasibility analysis of a venture idea: - brief description - objectives - resources required to achieve objectives - time line.	Ch. 12 Case Study 289	Ch. 5 Ch. 7 Ch. 6		31

Suggested Instructional Strategies and Learning Activities	Support Network
Individually, students develop a plan for a miniventure. At this stage, place the focus on the opportunity identified, the ideas generated and the inclusion of ALL elements of a venture plan. Have students exchange their completed plans with a classmate for discussion and feedback. Revise the plans and submit them to the instructor. Encourage students to share their plans with the entire class. At this stage, the ventures should be very simple in scope so students can successfully address each of the elements. School-based, one-day type ventures are highly recommended, and non-monetary type ventures should be encouraged.	
- Select an idea from previous brainstorming discussions. Create a decision tree, using Resource 11, <i>Entrepreneurship: The Spirit of Adventure</i>, and practise decision analysis. - Select case studies to analyze and discuss. - Have each student select one venture opportunity/idea, and complete a written feasibility analysis.	

MODULE 1: CHALLENGE AND OPPORTUNITY (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Considering Career Options	<i>The student will:</i>			Ch. 2, pp. 20–37; TM pp. 10–20; Ch. 4, pp. 73–78; TM p. 34	22 41 Ch. 13–15
	● outline personal characteristics and skills of enterprising individuals and organizations	Ch. 1–4, 9, 16	Ch. 1–2		
	● outline the meaning, role and responsibility of entrepreneurs and intrapreneurs in society, and how they initiate change		Ch. 1	Ch. 1, pp. 10–11; TM p. 3	1 16 pp. 64–66
	● develop a personal profile to assess own entrepreneurial/ intrapreneurial potential		Ch. 2	Ch. 4, pp. 70–71, 76–81; TM pp. 33–45	26 Ch. 2, 4
	● analyze the factors that lead to career decisions and opportunities/risks		Ch. 2	Ch. 1–2, pp. 5–8, 11–17; TM pp. 1–4	41 Ch. 10
	● assess career paths to which enterprise and innovation are particularly important		Ch. 2	Ch. 1, pp. 9–11; TM p. 1	
	● compare lifestyles of entrepreneurs and intrapreneurs with personal career choices		Ch. 2	Ch. 4, pp. 76–77; TM pp. 34–36	8 41 Ch. 7
	● relate personal goals to goal setting and career options as an entrepreneur or intrapreneur.	BLM 2–5, 12–13, 15–17, 26–28, 31–32, 34–35, 40	Ch. 2		

Suggested Instructional Strategies and Learning Activities	Support Network
• Complete Program No. 2 from Resource 16, <i>Entrepreneurship for Canadians: The Spirit of Adventure</i> kit. • View video Resource 22, <i>Young Entrepreneurs</i>, and discuss each case. Ask students if they know anyone personally, or in the community, who has created a venture. Remind students that they do not have to be profit ventures. Ask students to contact and invite these people to class to discuss entrepreneurship as a career as well as a lifestyle choice. • First, students prepare a personal profile outlining their goals, aspirations, dreams, skills, abilities, hobbies, interests, etc. Second, they explain ALL the things they do well. Next, outline the areas they need to improve and the skills they need to develop in order to be a successful entrepreneur. Finally, students conclude with an honest assessment of their career options as entrepreneurs and/or intrapreneurs.	

MODULE 2: PLANNING A VENTURE

Theme: Preparing for Action

Status: Foundation (Introductory Level)

The student will:

- demonstrate qualities that initiate change:
 - initiative
 - flexibility
 - leadership/team member
- apply personal goal-setting and problem-solving strategies that facilitate change effectively
- assess potential risks and propose strategies for assessing risks
- develop strategies for securing resources and support to implement a venture
- select, plan and assess a venture.

MODULE OVERVIEW

The students are challenged to formalize their venture-planning skills by examining the elements of planning and the various methods of identifying and assessing risk in any venture. They recognize the need for and build support networks that complement their personal strengths and weaknesses. Using this knowledge, students select, plan and assess a specific venture.

This module not only provides students with essential skills and elements for success, it also involves students in a wide range of active learning, hands-on experiences. These experiences build and motivate the students to a new level of confidence for future endeavours.

Key to "Resources" Column

See Print and Audio-visual section for full bibliographic annotation. Bold numbers correspond with resources in this list. Ch. = Chapter; BLM = Blackline Master; TM = Teacher's Manual.

MODULE EVALUATION STRATEGIES

The pedagogical techniques of the discovery method, and a variety of group participation and discussion activities, influence the evaluation methods used. Equal emphasis should be given to the development of venture-planning skills. Therefore, students should be encouraged to develop a portfolio that demonstrates their understanding, professionalism and creativity in venture planning. Self-evaluations should be encouraged throughout this module.

MODULE 2: PLANNING A VENTURE

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Organizing for Success	<i>The student will:</i>				
	• formulate short- and long-term goals for the selected venture • relate personal philosophy with venture goals • develop a mission statement for the venture • formalize operational policies consistent with the venture philosophy and business ethics • monitor and adjust the philosophy to meet the needs of the venture • outline a human resources plan • establish a support network: – locate and design potential support networks – propose strategies for securing and effectively using sources of support.	Ch. 13 Case Study 313 BLM 36 Ch. 15 Case Study 358 BLM 36	Ch. 2, 12–14 Ch. 14 Ch. 9 Ch. 8 Ch. 8	Ch. 17 Ch. 15, pp. 302–305; TM pp. 138–139	41 Unit 4
Analyzing Markets	<i>The student will:</i> • analyze potential markets: – local – regional – national – international/global	Ch. 11–12, 14	Ch. 4, 7	Ch. 9, pp. 172–181; TM pp. 81–87	41 Unit 5

Suggested Instructional Strategies and Learning Activities	Support Network
• Develop a professional business prospectus. Use appropriate text editing technology. Include: - venture name, trademark and slogan - executive staff and positions - mission statement for the venture - short- and long-term goals for the venture - outline for each component of a successful venture plan.	
• Allow groups of students to brainstorm as many potential markets as possible for a product or service. Share, expand, categorize and eventually prioritize according to: - local - regional - national - international/global market potential.	

MODULE 2: PLANNING A VENTURE (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Analyzing Markets (continued)	- relate market projections to trends and forecasts - assess potential competition - outline venture needs regarding: - target market - product/service - pricing - location - examine and appraise potential changes in the market.		Ch. 4 Ch. 7 Ch. 7 Ch. 7	Ch. 9	
Assessing and Minimizing Risk	<i>The student will:</i> - examine the types of potential risks: - physical - financial - human resources - propose strategies to assess and minimize risk - complete a risk assessment.	Ch. 6 Case Study 121	Ch. 4 Ch. 12 Ch. 5 Ch. 13	Ch. 6, pp. 103-105; TM pp. 52-57 Ch. 6, p. 104; Ch. 12, p. 235	

Suggested Instructional Strategies and Learning Activities	Support Network
• Have each student report on a trend occurring in society. Use newspapers and magazines. As a class, discuss/predict possible effects of these trends. • Develop a chart that connects trends with innovations and new products and services.	
• Challenge the students with a "Take a Risk Exercise" from Resource 29, <i>The Entrepreneurial Spirit</i>, teacher's manual. Discuss aspects of risk assessment. • Select a sampling of ventures representing varied degrees of risk. Ask students to complete a risk assessment on each. Discuss and compare. • Illustrate that entrepreneurs tend to be calculated risk takers who examine risk carefully. Use "Strategy for Risk" from Resource 16, <i>Entrepreneurship for Canadians: The Spirit of Adventure</i>, user's guide.	

MODULE 2: PLANNING A VENTURE (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Completing a Venture Plan	<i>The student will:</i> - complete a venture plan: - purpose - description/objectives - market research and analysis - marketing plan - production/service plan - financial plan - human resources/organizational plan - analyze the venture plan and revise as necessary.	Ch. 12 Case Study 289 BLM 33	Ch. 6 Ch. 7, 13	Ch. 17, pp. 340-360; TM pp. 156-161	41 Unit 7 16 pp. 151-155 26 Ch. 6
Presenting the Venture Plan	<i>The student will:</i> - explore various presentation techniques - present the venture plan - analyze and assess the outcome of the presentation.		Ch. 13	Ch. 17, p. 357	41 Unit 7

Suggested Instructional Strategies and Learning Activities	Support Network
• Complete the venture plan for the miniventure started in Module 1. Focus on the understanding, analysis and completion of the remaining items in the venture plan. • Complete Program No. 4 and Program No. 5 from Resource 16, <i>Entrepreneurship for Canadians: The Spirit of Adventure</i> kit. • Discuss different methods that could be used to assess the venture.	• Invite a representative from a local bank, or one of the business partners, to assess and discuss the venture plan.
• Encourage students to consult with other teachers in the school (language arts, visual communications) to explore various presentation techniques. • Prepare and practise a presentation of the venture plan with classmates. Arrange for a formal presentation to a bank manager or other outside resource person.	

MODULE 2: PLANNING A VENTURE (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Assessing the Venture	<i>The student will:</i> • assess criteria used by other individuals and groups for a successful venture • assess the strengths and weaknesses of the venture • prepare a written critique assessing the venture.	Ch. 12 Case Study 289 BLM 36	Ch. 5 Ch. 12-13	Ch. 5, p. 101	31
Considering Career Options	<i>The student will:</i> • examine own leadership style • evaluate own leadership style and its appropriateness for the success of the venture.	Ch. 3, 15-16 Case Studies 7, 15, 90, 121, 342, 382, 391 BLM 2-3, 12-13, 15, 17, 40	Ch. 2 Ch. 12	Ch. 1-2, pp. 17, 21-22; TM pp. 6, 10	25 p. 207 21 p. 153 16 p. 201

Suggested Instructional Strategies and Learning Activities	Support Network
• Assess the proposed venture. Use the "Venture Planning Guide" in Resource 16, <i>Entrepreneurship for Canadians: The Spirit of Adventure</i>. Revise the criteria as necessary. • Use the SWOT approach to brainstorm: - strengths - weaknesses - opportunities - threats.	
• Students individually recall an experience where they were in charge. A list of questions could be provided to help the students analyze their own leadership style. • In small groups, discuss different situations to determine which leadership style would be the most effective in each situation.	

MODULE 3: MAKING IT HAPPEN

Theme: Making It Happen

Status: Expansion (Intermediate Level)

The student will:

- implement a venture
- establish management procedures required to start the venture
- demonstrate leadership qualities in implementing the venture
- manage problem solving and decision making at each implementation stage of the venture
- assess the venture.

MODULE OVERVIEW

The purpose of this module is to put the venture plan into action. Students study management procedures and practices involved in starting a venture. They examine different management models and leadership styles. They generate and develop the factors necessary in starting a venture. They formulate policies for successful decision making and organization.

The students examine alternatives and develop methods to meet human resources needs, financial needs, and the marketing, production and service requirements of a specific venture. Finally, they examine alternatives and develop assessment criteria for the venture.

Throughout the module, students apply the theories of planning and start-up management to their venture concept, and thus develop appreciation for the planning and management requirements of starting a venture.

Key to "Resources" Column

See Print and Audio-visual section for full bibliographic annotation. Bold numbers correspond with resources in this list. Ch. = Chapter; BLM = Blackline Master; TM = Teacher's Manual.

MODULE EVALUATION STRATEGIES

The focus of this module is on start-up management. Students are encouraged to identify and develop the elements necessary to start the venture. Evaluation should be based on oral and written reports, surveys, interviews, research projects, presentations and teamwork. Students should be encouraged to complete self-evaluations throughout this module.

MODULE 3: MAKING IT HAPPEN

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Starting the Venture	<i>The student will:</i> - determine the start-up requirements for the venture - examine legal obligations that affect the venture - analyze the common forms of business ownership: - sole proprietorship - partnership - corporation - cooperative.	Ch. 9, 11, 13-15 Case Studies 289, 313, 332, 342, 270 BLM 2-3, 17, 26, 28, 35	Ch. 5, pp. 149-150 Ch. 8, 14 Ch. 8	Ch. 5, pp. 93-96; TM pp. 46-51 Ch. 11, pp. 212-222; TM pp. 102-111	26 pp. 51-52 38
Managing the Venture	<i>The student will:</i> - discuss the functions of management - analyze why businesses fail, and illustrate the consequences of poor and/or inadequate planning - examine short- and long-range plans for the venture	Ch. 15 Case Studies 95, 268, 322, 358 BLM 5, 17, 29, 33	Ch. 12 Ch. 10, 12 Ch. 12	Ch. 10, pp. 202-204; TM p. 93 Ch. 10, pp. 190-208; TM pp. 92-101	41 Unit 4 16 6 p. 280 25 p. 117 21 p. 130 38 p. 388

Suggested Instructional Strategies and Learning Activities	Support Network
• Begin a journal for use in guided reflection, time management and reference for assignments. • Identify the resources and assets necessary to start the venture. • Suggest and select appropriate acquisition procedures for the needed resources and assets. • Evaluate the venture plan in terms of costs. Assess the feasibility of the venture in relation to the costs. • Research and report on a section of the legal obligations of a venture start-up. • Determine the obligations that apply to this venture. • Prepare a time line and a plan for meeting the obligations. • Divide the class into small groups. Each group is assigned one of the common forms of business ownership. The groups prepare presentations and posters explaining the nature of the ownership and its advantages and disadvantages. Encourage the groups to be creative with their presentations and posters.	
• Brainstorm and develop short- and long-range plans for the venture. • Propose an organizational structure for the venture. • Debate the merits of the proposed structure. • Select and illustrate an organizational structure. • Examine case studies of failed ventures, and have students suggest strategies that might have allowed the ventures to succeed.	

MODULE 3: MAKING IT HAPPEN (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Managing the Venture (continued)	examine management models and leadership styles.		Ch. 12		
Marketing the Venture	<i>The student will:</i> - formulate a market plan considering: - sales and distribution - advertising - pricing.		Ch. 9	Ch. 14, pp. 276-296; TM pp. 128-137	41 Unit 5
Financing the Venture	<i>The student will:</i> - examine the need for and limitations of a budget and its implications in the financial plan of the venture: - income - expenditures: - production - labour - distribution - marketing - design a strategy for measuring, monitoring and controlling results against the plans - prepare a cash flow projection.	Ch. 13-14 BLM 37	Ch. 10-11 Ch. 10	Ch. 15	41 Unit 6 3A 3B

Suggested Instructional Strategies and Learning Activities	Support Network
• Study and compare a variety of leadership styles and management models. Divide the class into groups, and have them role play examples of the models studied. • Have students identify their own leadership styles, explain why it is best for them, and how it will help the venture to succeed. This could be done as a presentation or written assignment. • Develop a management model for the venture.	
• Students develop a marketing plan for their venture and determine the costs and feasibility. Revise and amend the plan until it is workable for the particular venture.	• Invite a guest speaker to discuss the aspects of marketing, such as location, promotion, distribution, pricing, etc.
• Prepare a budget for the venture. • Debate the merits of the budget, and amend as necessary. • Develop a cash flow projection for the venture. This should be done using appropriate technology.	• Invite a guest speaker to: - discuss the importance of budgeting - suggest monitoring methods.

MODULE 3: MAKING IT HAPPEN (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Human Resources Requirements	<i>The student will:</i> - ascertain human resources needs and how these are to be met - identify career ladders for personnel.		Ch. 12	Ch. 2, pp. 18-26; Ch. 4, pp. 73-78	6 p. 17
Producing/ Servicing Requirements of the Venture	<i>The student will:</i> - describe the product or service in terms of: - characteristics: - quality - excellence - labour: - availability - efficiency - effectiveness - suppliers - equipment/technology - property and facilities - cost data.		Ch. 8-9		

Suggested Instructional Strategies and Learning Activities	Support Network
• Determine the necessary human resources and skills for the venture.	
• Complete a "Research Assistance Grid" from Resource 28, <i>Entrepreneurship: Creating a Venture</i>, to help determine the production needs of a venture. Included in this grid are questions of: - What? - Why? - Where? - When? - Who? - How?	

MODULE 3: MAKING IT HAPPEN (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Assessing the Venture	<i>The student will:</i> • compare and contrast various ways of assessing ventures • develop a set of criteria to assess the venture • examine personal/individual motives in relation to the development and creation of the venture • relate leadership strategies to venture analysis • assess the lifestyle implications of the venture • analyze the venture in terms of change and trends projected for the future • prepare a written critique of the venture.	Ch. 12 Case Study 289 BLM 36		Ch. 10, pp. 190-202; TM pp. 93-95	

Suggested Instructional Strategies and Learning Activities	Support Network
• Establish assessment committees responsible for: - developing a set of criteria for venture assessment - analyzing the venture, using the identified assessment tools - presenting, comparing and discussing the information collected. Individual students consolidate this information and produce a written critique.	

MODULE 4: ANALYZING VENTURES

Theme: Preparing for Action

Status: Expansion (Intermediate Level)

The student will:

- describe and apply various methodologies for analyzing and evaluating ventures:
 - market analysis
 - industry analysis
 - financial analysis
 - human resources analysis
 - product/service evaluation
- analyze the research, compare a variety of ventures and make informed decisions about the feasibility of each venture
- provide a written critique of a venture.

MODULE OVERVIEW

The main focus of this module is to take the venture ideas generated and work through a process that eventually provides students with the knowledge and ability to decide whether or not a venture is feasible. The goal of this module is to expose students to various kinds of research strategies. Using this information, students then develop and implement a specific research study for a particular venture, equipping themselves with the tools needed to make an informed decision on the feasibility of a venture.

The module not only includes some very valuable technical information, it also involves the students in a wide range of hands-on experiences.

Key to "Resources" Column

See Print and Audio-visual section for full bibliographic annotation. Bold numbers correspond with resources in this list. Ch. = Chapter; BLM = Blackline Master; TM = Teacher's Manual.

MODULE EVALUATION STRATEGIES

This module is based on process-oriented activities; therefore, evaluations should be based on participation, presentations, projects and group work. Formal evaluation should be kept to a minimum. Self-evaluation by the students should be incorporated into different phases of this module.

MODULE 4: ANALYZING VENTURES

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Conducting Research	<i>The student will:</i> - describe various methodologies for analyzing and evaluating ventures: - personal criteria - market analysis - industry analysis - financial analysis - human resources analysis - product/service evaluation - examine criteria important to the success of various ventures: - personal criteria - effectiveness of human resources - customer benefits - ability to raise capital - return on investment - growth potential - technical feasibility - simplicity of manufacturing - ease of operation - quality of product/service - marketability - size of market - advertising potential - conduct market research, collecting both primary and secondary data, and indicate the advantages and disadvantages of each	Ch. 7, 9, 11-12, 14 Case Studies 214, 332	Ch. 4, 7	Ch. 8	13 Ch. 4

Suggested Instructional Strategies and Learning Activities	Support Network
• Brainstorm personal experiences related to marketing research; e.g., telephone survey, Nielson rating. • Discuss primary and secondary research. • Show examples of different methods of research; e.g., survey, observation, experimentation, interview. • Participate in different methods of gathering research. Examples include: - survey; make a sample questionnaire - observation of buying habits at local outlets - experimentation; e.g., sample product(s) - interview business owners on the type of research methods they are using - newspaper/bulletin board advertisements. • Show a video/film on research methods.	• Invite a speaker from Statistics Canada, or a telemarketing firm, to discuss methods of data collection. • Invite guest speakers from business consulting firms.

MODULE 4: ANALYZING VENTURES (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Conducting Research (continued)	● outline various primary data collection methods: - observation - surveys - questionnaires ● identify sources of secondary data: - libraries: ● school ● public ● government - associations: ● business ● professional - journals: ● trade ● business ● professional - publications: ● federal ● provincial ● municipal.		Ch. 7	Ch. 13, pp. 255-259	
			Ch. 7	Ch. 17, pp. 343-356	

Suggested Instructional Strategies and Learning Activities	Support Network
• Choose a current issue, and have students design and implement a study, using primary research methods; e.g., a questionnaire for interviewing the school population. Students collect and record responses, and report the results to their classmates and the participants. • Interview small business owners about research methods used to determine product saleability. • Study demographic influences on research strategy. • Design a team competition predicting statistics, based on current trends. Develop and conduct a survey, and create game questions based on the survey results.	

MODULE 4: ANALYZING VENTURES (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Analyzing Data	<i>The student will:</i> - analyze and compare ventures in terms of: - personal criteria - human resources - production - managing - marketing - distribution - technical feasibility - general acceptance - competition - legalities - discuss potential risks involved in ventures: - financial - personal - legal - societal - environmental - compare various venture plans in terms of: - market analyses - operating plans - financial plans - compare the financial plan/projection of various ventures or case studies through an analysis of such aspects as: - working capital/cash flow - operating expenses - financial ratios - profitability.	Ch. 14 BLM 36	Ch. 4-5, 7-8 Ch. 13 Ch. 10	Ch. 11 Ch. 15, 16; TM pp. 149-155	13 Ch. 4 12 Ch. 14

Suggested Instructional Strategies and Learning Activities	Support Network
● Brainstorm predictable and unpredictable external factors that could affect data collection: - fluctuating economy - fads - seasonal changes - acts of God - outbreak of war. ● Analyze various forms of displaying collected data: - graphs - charts - tables. ● Incorporate the use of computer programs at this stage, such as graphics and integrated software packages. ● Compare various ventures by calculating business ratios for solvency, efficiency and profitability.	● Invite guest speakers to explain how data are used: - market analysis firms - business owners from the community - personnel from Statistics Canada. ● Invite a speaker from a business consulting firm.

MODULE 4: ANALYZING VENTURES (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Assessing Ventures	<i>The student will:</i> • by using the data presented, assess the strengths and weaknesses of each venture • select the most feasible venture based on the analyzed data • prepare a written critique, including an in-depth analysis and assessment of a venture.	Ch. 2, 4, 8 BLM 2-5, 12-13, 15-17, 26-28, 31-32, 34-35, 40	Ch. 4-5, 7, 10-11	Ch. 10, pp. 190-202	

Suggested Instructional Strategies and Learning Activities	Support Network
● Use the SWOT approach to brainstorm: - strengths - weaknesses - opportunities - threats. ● Review the steps in the decision-making process. ● Ascertain how research can help determine the success or demise of a business. ● Determine the viability of a venture, using previously analyzed data.	● Invite guest speakers from the community who have been involved in successful and unsuccessful ventures to share their experiences.

MODULE 5: FINANCING VENTURES

Theme: Preparing for Action

Status: Expansion (Intermediate Level)

The student will:

- examine various sources of financing for ventures
- distinguish between short- and long-term financing
- analyze the advantages and disadvantages of financial options
- demonstrate the process of applying for different types of financing.

MODULE OVERVIEW

The competitive nature of our economy, and the fast pace at which business conditions develop, requires that entrepreneurs have more capital and more sophisticated management skills than ever before. New entrepreneurs find that many decisions require technical knowledge beyond their own areas of expertise. Often they need the advice of specialists, such as accountants, lawyers, insurance brokers or bankers. This module does not take the place of experts, rather, it highlights some of the more important financial considerations of which entrepreneurs should be aware for the welfare of their ventures.

Almost every person managing a venture requires financial help at some point. One of the more important tasks for entrepreneurs is to plan and obtain the necessary financing to enable them to carry out a venture. To obtain financing beneficial to the venture, an entrepreneur needs to recognize the importance of good financial arrangements, be aware of the different methods of financing a business and determine from where the necessary funds are available. The focus in this module is on the various financial sources available for a venture. It is recommended that instruction be in conjunction with the creation of a specific venture. However, concepts from this module could be taught independently.

Key to "Resources" Column

See Print and Audio-visual section for full bibliographic annotation. Bold numbers correspond with resources in this list. Ch. = Chapter; BLM = Blackline Master; TM = Teacher's Manual.

MODULE EVALUATION STRATEGIES

Evaluation should be ongoing and specific to the activities selected by the teacher and students. Strategies could include tests, field trip evaluation forms, presentations, group work, assignments and contracts.

MODULE 5: FINANCING VENTURES

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Financing Terminology	<i>The student will:</i> • explain equity capital • explain debt financing • categorize given examples of equity capital and debt financing • become familiar with a glossary of terms relevant to financing ventures.	Ch. 14–15 Case Studies 342, 366	Ch. 11 Ch. 11 Ch. 11 Ch. 16	Ch. 5, pp. 89, 98; TM p. 46 Ch. 5, pp. 90, 98; TM p. 46 Ch. 15, pp. 302–307; TM pp. 138–139 Ch. 5, pp. 89–98; TM pp. 46–51, 385–394	41 Unit 6
Equity Capital	<i>The student will:</i> • examine various sources of equity capital: – personal capital: • self • family • friends – venture capital: • venture capitalists • business “angels” – partnerships – shares – stocks/bonds • debate characteristics of sources of equity capital within the local community.	Ch. 13–15	Ch. 11	Ch. 15, pp. 302–305; TM pp. 138–139 Ch. 15, pp. 310–312; TM p. 139	

Suggested Instructional Strategies and Learning Activities	Support Network
• Have students create their own glossary of terms related to financing. • Use a cooperative learning approach where small groups of students develop definitions for a given set of terms and present these to their peers. • Have students create a memory recall type of game to learn the various terms. • Collect relevant brochures and literature. • Have students create posters/flash cards with financial terms for classroom display. • Create a bulletin board displaying current and relevant financial articles. • Critique various media productions related to such things as investments and consumer awareness.	• Local newspapers. • Financial magazines. • Visit a local financial institution to discuss financing with a loans officer.
• Set up a stock market; e.g., "penny stocks", and chart the investment; or use simulation to follow the progress of a specific stock over a period of time. • Sell stocks/bonds/memberships for the venture. • Relate equity capital to various clubs or organizations within your school or community; e.g., student council, clubs, community leagues. • Create a proposal to obtain equity capital for a venture. • Brainstorm to identify sources of equity capital.	• Invite a guest speaker from a brokerage house or local business. • Interview/survey local businesses to identify sources of equity capital used.

MODULE 5: FINANCING VENTURES (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Debt Financing	<i>The student will:</i> ● examine various sources of debt financing: – personal savings – family/friends – financial institutions: ● banks ● credit unions ● trust companies ● government organizations – loan sharks – debentures – mortgages ● debate characteristics of sources of debt financing within the local community ● locate, compile and complete loan applications with local financial institutions ● discuss other sources of financing and assistance: – suppliers – memberships – fund raising – sales – societies – foundations – government.	Ch. 7, 13-14 TM 81 Ch. 1-2, 14	Ch. 11 Ch. 11	Ch. 15, pp. 302-307; TM pp. 138-139	

Suggested Instructional Strategies and Learning Activities	Support Network
• Brainstorm to identify sources of debt financing. • Fill out a loan application from a financial institution. • Complete a case study activity on debt financing. • Prepare a financing proposal for a venture. • Brainstorm to identify alternative sources of venture capital. • Sell memberships to raise funds for a venture; e.g., ski club. • Organize one or more fund-raising activities; e.g., bake sale, dance. • Investigate sources of grants in the local community. • Investigate regulations required by the Attorney General's Department for fund-raising activities; e.g., raffles, bingos, casinos.	• Visit local financial institutions to obtain information on debt financing. • Invite guest speakers from various lending institutions. • Contact: - Consumer and Corporate Affairs - Attorney General's Department.

MODULE 5: FINANCING VENTURES (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Cash Flow	<i>The student will:</i>				
	• examine financial needs at various stages of ventures	Ch. 14	Ch. 10	Ch. 15, pp. 298-299; TM p. 138	
	• distinguish between fixed and variable costs	Case Study 322	Ch. 9	Ch. 5, p. 90	
	• formulate and explain a "break even analysis" for ventures	BLM 36-37	Ch. 10	Ch. 16, p. 333	
	• distinguish between short- and long-term financing		Ch. 11		
	• differentiate between cash flow, and profit and loss statement		Ch. 10-11	Ch. 16, pp. 325-332; TM pp. 149- 155	
	• prepare a sample cash flow.		Ch. 10	TM p. 150	

Suggested Instructional Strategies and Learning Activities	Support Network
• Have students chart the cash flow needs of their ventures for a fixed period of time. • Differentiate between short- and long-term financing and the costs involved (interest rates). • Create a simulation involving a \$1 000 loan, borrowed over various lengths of time; e.g., six months, one year, five years. • Discuss why interest rates fluctuate.	

MODULE 5: FINANCING VENTURES (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Making a Choice	<i>The student will:</i>				
	- research and evaluate various financial options in terms of: - advantages/disadvantages - inherent risks - costs - stress - relationships - decision-making power		Ch. 11	Ch. 15, pp. 298-299, 302-307, 309-312; TM pp. 138-148	
	- consult with appropriate specialists: - accountants - lawyers - insurance brokers - bankers - consultants		Ch. 11		
	select the financial alternatives that best meet the needs of the venture				
	prepare and present a financial plan for the venture		Ch. 10-11		
	analyze and assess the outcome.				

Suggested Instructional Strategies and Learning Activities	Support Network
• Develop a chart showing the advantages and disadvantages of sources for financing a business. • Choose the best financial arrangement for your venture based on the nature of the venture, costs, risks, etc.	• Invite a variety of speakers to discuss possible consequences of the financing alternatives: - loans officer - collection agency - police - local business individual.

MODULE 6: MARKETING THE VENTURE

Theme: Making It Happen

Status: Expansion (Intermediate Level)

The student will:

- analyze various marketing strategies for their applicability in terms of marketing mix for a target market
- formulate and implement a marketing strategy for a particular venture
- appraise the strengths and weaknesses of the marketing strategy, and revise as necessary.

MODULE OVERVIEW

Promotion can make or break a business. This module provides the students with basic information related to promotion and its strategies; from a generalistic viewpoint and a focused viewpoint. Students have the opportunity to experience hands-on, task-oriented skills with various promotional approaches. As well, they gain the necessary information for finding promotional assistance; e.g., resources, resource people.

It is recommended that this module be taught in conjunction with the creation of a specific venture. However, it could be taught independently of a venture through the use of various simulation exercises.

Key to "Resources" Column

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MODULE EVALUATION STRATEGIES

Evaluation can be at the discretion of the instructor. It may be formative testing in terms of concepts and terminology, or it may be practical testing based on predetermined criteria; e.g., displays, bulletin boards, advertisements or any combination of criteria.

Students should be encouraged to develop a portfolio of assignments demonstrating their creativity in promoting various types of ventures. Assignments should be practical and hands-on; e.g., actually developing promotional materials, such as brochures or radio advertisements. Consideration could be given to having students make class presentations. Individuals from promotion agencies could be invited to offer constructive suggestions for proposals.

MODULE 6: MARKETING THE VENTURE

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Marketing Objectives	<i>The student will:</i>				
	• apply the concept of marketing to a particular venture	Ch. 13-15	Ch. 9	Ch. 14	41 Unit 5
	• analyze the relationship between marketing and other venture decisions	Case Study 358		Ch. 14, pp. 276-296; TM pp. 128-137	9 pp. 389, 400-401
	• examine the decisions that must be made when completing a marketing plan	BLM 36			
	• research sources of assistance and information, and create a support network.				

Suggested Instructional Strategies and Learning Activities	Support Network
• Discuss the concept of promotion: "What is it?" • List the parts of a promotional objective, and develop one example. • Collect a variety of promotional examples covering a wide range, from traditional advertisements to publicity releases; e.g., newspapers, magazines, radio, television, coupons, billboards, busaramas, sidewalk signs or placards, store displays. • Discuss how other venture decisions are related to promotional activities; e.g., hours of operation, acceptance of credit cards, special services. • Consider how other venture decisions are applied to each promotion, using the variety of promotional examples previously collected. • Discuss the following statement: "Promotion needs to be planned at the same time as other marketing decisions are made." • Brainstorm to determine the components of a promotional plan; i.e., what is involved in promotional planning? - who will be the communicator? - what information needs to be communicated? - with whom is communication needed? - what information is needed by the target market to make a decision? - what media should be used? - what method(s) would be most effective? - how much money is needed for the promotion?	• Invite guest speakers to give their perception of promotion: - promotional consultants from malls - radio stations - TV stations - local personalities.

MODULE 6: MARKETING THE VENTURE (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Targeting the Market	<i>The student will:</i> - differentiate between primary and secondary data - conduct basic marketing research from the following sources in order to identify the primary target customer: - secondary sources: - trade magazines - news articles - the <i>Yellow Pages</i> - Statistics Canada - primary sources: - observing - interviewing potential customers - identify and describe a typical customer in terms of: - psychographics: - lifestyle - buying habits - attitudes - opinions - demographics: - education levels - income - age - geographics: - geographic area		Ch. 7 Ch. 7 Ch. 7	Ch. 14, pp. 275-281	

Suggested Instructional Strategies and Learning Activities	Support Network
• Create, for an actual venture, an example for each of the five steps involved in promotional planning. • Collect examples of advertisements for three different brands of the same product. Analyze the advertisements, and make a presentation to the class, or create a bulletin board display. Develop a chart to show the differences among the brands. Write a brief statement discussing how valuable advertisements would be in helping to make buying decisions. • Brainstorm to get ideas of whom to see or where to go (contacts) for promotional assistance or information. • Tour an advertising agency or public relations firm to learn how they can assist businesses. • Evaluate the advantages and disadvantages of an advertising agency to a small business.	

MODULE 6: MARKETING THE VENTURE (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Targeting the Market (continued)	• use statistical information to identify the number of potential customers within the marketing area • analyze a particular venture in terms of the marketing mix: – product service characteristics; i.e., unique selling points – pricing – distribution channels – promotion.		Ch. 7 Ch. 9	Ch. 14, pp. 276–288; TM pp. 128–129	
Marketing Strategies	<i>The student will:</i> • identify and analyze various marketing strategies for their applicability in terms of marketing mix for a target market • justify the importance of a marketing program for the venture: – economic – social – business	Ch. 13–15	Ch. 9	Ch. 14, pp. 294–296; TM pp. 130–137	9 pp. 391–392, 407

Suggested Instructional Strategies and Learning Activities	Support Network
• Divide the class into groups of three to four students each. Assign each person in the group the responsibility for a certain area of media, such as newspapers, radio stations, outdoor advertising companies and so on. Have each person gather information on individuals, organizations or companies in their area that help small businesses plan promotional activities. Collect all the information, and compile a resource booklet for the class.	
• Review basic communication frameworks from other courses; e.g., English, mathematics, business. • Discuss the generalized communication process, using as a resource such telecommunications as radio. • Discuss how the generalized communication process transforms into the market communication process in a promotional strategy. • Develop a chart illustrating the market communication process, using specific examples. • Collect examples of public relations activities completed in the local community by small and large businesses. Determine if there are differences between small and large public relations activities. • List the six steps involved in planning a public relations program. Describe each step in detail.	

MODULE 6: MARKETING THE VENTURE (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Marketing Strategies (continued)	• compare the various techniques of promotion: - advertising - personal selling - free publicity - sales promotion - merchandising - trade shows • analyze cost/benefit factors in the selection of alternative marketing strategies • formulate and implement a promotional strategy, within a predetermined budget, for a particular venture.		Ch. 9	Ch. 14, pp. 281-283; TM pp. 128-129	12 Ch. 14

Suggested Instructional Strategies and Learning Activities	Support Network
• Brainstorm as a class, a list of ways that the school could be publicized. Discuss the value of developing a public relations program for the school to use in the community. • Discuss the advantages and disadvantages of various types of advertising media. • Have the students collect as many examples of sales promotion as possible. Analyze each one, determine its purpose, and decide as a class if it seems to be an effective use of sales promotion; e.g., concept of keeping a simple approach. • Choose a successful promotion for a current product or service, and analyze it. • Choose a product or service that might be sold by the venture that has been selected for this course. Write and design an advertisement for this product or service that could be used (1) in a newspaper, (2) in a radio advertisement, (3) on a billboard, and (4) in a direct mail advertisement. Be sure to sketch out in the copy any illustrations that might be useful in explaining the product/service. Also, list any suggestions concerning such features as the colour of the advertisement, the headline style and size, the "action" wording, or the music to be used. For the direct mail advertisement, also select an appropriate audience to receive the material. • Prepare a list of ten different types of products or services. For each product/service, determine which type of promotional method(s) would be best for informing potential consumers. Why was each method selected? • Contact a newspaper, a radio station and a television station to determine the costs of advertising for each medium. Prepare a chart comparing these costs.	• Invite three types of salespeople to meet with the class: - a clerk in a discount store - a person who sells furniture - a person who sells industrial equipment. Have them describe their duties and the training and background needed for each job. Discuss the similar and different activities in their jobs. Why do these salespeople need different skills? • Contact several business people and determine what types of trade sales promotion methods are offered to them by manufacturers. • Invite guest speakers from various advertising media; e.g., educational consultants from local print or broadcast media.

MODULE 6: MARKETING THE VENTURE (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Analyzing Marketing Strategies	<i>The student will:</i> • appraise the strengths and weaknesses of the marketing strategy, and revise as necessary.		Ch. 9	Ch. 10, pp. 194-195; Ch. 14, p. 276; Ch. 17, pp. 345-356; TM pp. 158-161	

Suggested Instructional Strategies and Learning Activities	Support Network
• Develop a list of as many methods as possible for evaluating promotional activities. Determine the strengths and weaknesses of each method. Textbooks and other resources can help in this activity. • Formulate criteria for determining the effectiveness of such promotional activities as school contests, panel discussions. • Have members of the class interview several small business owners to determine the type of problems they most often encounter with promotion. Also, ask owners to identify the methods used in planning promotional activities. Compare the results. Are some problems more common than others? Why or why not? Could some of the problems have been avoided through a better promotional plan? Have each member of the class report his or her findings. Following the reports, have a class discussion on how sound promotional planning can be used to prevent problems.	

MODULE 7: MANAGING THE VENTURE

Theme: Making It Happen

Status: Expansion (Advanced Level)

The student will:

- manage the venture by performing the following functions:
 - planning
 - organizing
 - managing human resources
 - managing finances
 - monitoring
- establish management procedures necessary to implement the venture
- examine critical risks, and develop contingency procedures
- monitor the venture plan, and revise as necessary.

MODULE OVERVIEW

All ventures require people to manage daily operations. All too often ventures depend on individuals who have neither the skills or the training to run routine functions on a daily basis. The information in this module is designed to facilitate and enhance not only the theory aspect of management, but also offers the students a strong, practical, hands-on reinforcement to their learning.

The information covered benefits individuals who:

- will be entering business as employees
- will be entering business at a management level
- will own and operate their own business
- will establish volunteer, community or service programs
- are unsure of their career goals but are interested in entrepreneurship/intrapreneurship in general.

The information is presented in a way that students are able to:

- learn business terms
- be involved in hands-on activities
- discover the importance of proper business procedures
- be prepared to make career decisions.

This module may be taught in conjunction with other modules, or the information and activities may be linked with other modules.

Key to "Resources" Column

See Print and Audio-visual section for full bibliographic annotation. Bold numbers correspond with resources in this list. Ch. = Chapter; BLM = Blackline Master; TM = Teacher's Manual.

MODULE EVALUATION STRATEGIES

Because of the expected participatory nature of this module, it is suggested that evaluation be based on participation. The weighting for different areas of the module would be at the discretion of the instructor.

As this module is best developed using team and class discussion and the discovery method, student evaluation should reflect the delivery strategy. Some knowledge exams could be used. Presentations, participation, oral and written reports and production of assignments could be methods of evaluation.

MODULE 7: MANAGING THE VENTURE

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Planning	<i>The student will:</i> ● evaluate the objectives and goals of the venture ● examine management functions: - leading - motivating - morale building - planning - directing - problem solving - decision making - communicating - organizing - monitoring ● analyze the goals, and develop a plan of action to fulfill venture requirements in terms of: - capital - labour - marketing - production/service ● examine the need for accounting procedures, and review source documents, such as: - sales receipts - cash register records - cheque stubs ● appraise government regulations dealing with: - health - safety - compensation	Ch. 14 BLM 33	Ch. 12 Ch. 8	Ch. 17, pp. 340-356; TM pp. 156-162 Ch. 16, pp. 324-334; TM pp. 149-155	41 Unit 4 24 Ch. 12-13

Suggested Instructional Strategies and Learning Activities	Support Network
• Plan for daily tracking of supplies and inventory: - classroom inventory - personal inventory - school store inventory. • Brainstorm to identify forms of internal and external security, and the need for each. • Have students analyze and discuss case studies of well-known failures.	

MODULE 7: MANAGING THE VENTURE (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Planning (continued)	• discuss ethical and unethical business practices • examine the marketing mix: - product/service - pricing - location - promotion • formulate a plan to monitor: - inventory - supplies.		Ch. 14 Ch. 9		See Module 6: Marketing the Venture 21 p. 211 10 p. 149
Organizing	<i>The student will:</i> • describe qualities of leadership as a management tool • compare the effects of leadership styles on human relations		Ch. 2 Ch. 12		

Suggested Instructional Strategies and Learning Activities	Support Network
• List ethical and unethical business practices. • Have students write and act out a short skit demonstrating unethical business practices: - have the audience identify each unethical practice demonstrated.	
• Role play various management styles to demonstrate their effects on employees.	

MODULE 7: MANAGING THE VENTURE (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Organizing (continued)	• develop an organizational structure to achieve the goals and objectives of the venture • analyze the organizational structure in terms of: - flexibility - suitability to type and size of venture - communication channels - decision-making process - efficiency • establish and maintain effective internal/external communication functions.		Ch. 12	Ch. 17	
Managing Human Resources	<i>The student will:</i> • describe the necessary components/strategies of: - recruitment - human resources development • examine characteristics for a supervisor role • discuss the components of remuneration: - tangible - intangible • assess impact of working conditions on organizational culture		Ch. 8, 12		

Suggested Instructional Strategies and Learning Activities	Support Network
• Prepare an organizational chart for the venture. In groups, analyze the organizational structure. Provide suggestions for improvement. Revise as necessary. • Learn proper business communications by: - having students compose a letter to either a: • supplier • customer • debtor - organizing a meeting - demonstrating telephone etiquette and procedure by simulation.	
• Have students complete an interview activity; e.g., simulation using reverse role situations (employer-employee). • Visit different employment agencies to find out recruiting procedures and qualification requirements. • Discuss and suggest the characteristics of an ideal supervisor. • List the different ways of being rewarded for effective work; e.g., "pay" is made up of more than just money.	• Have a guest speaker come in and talk about recruiting, hiring and firing. • Bring in a guest speaker to talk about different types of staff training.

MODULE 7: MANAGING THE VENTURE (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Managing Human Resources (continued)	• explain impact of morale on productivity • apply the use of an organization plan prepared by others • demonstrate conflict resolution strategies • demonstrate negotiating skills • propose a system to deal with tardiness and absenteeism • formulate a plan to encourage: - team building - professionalism.		Ch. 12		
			Ch. 12		

Suggested Instructional Strategies and Learning Activities	Support Network
• Research the effects of different surroundings on productivity. • Have students design a layout for a productive office. Consider such ergonomic factors as lighting, colour, furniture. • Have students complete a sample organizational flow chart to show a typical business set-up. • Review with students a variety of case studies; and role play conflict resolution strategies. • Have students develop a checklist regarding personal attitudes toward absenteeism and tardiness.	• Have a guest speaker discuss labour conflict resolutions.

MODULE 7: MANAGING THE VENTURE (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Managing Finances	<i>The student will:</i> • examine accounting functions: - cash flow - profit and loss - balance sheet • perform banking functions: - identify banking institutions - properly complete various forms • design a sample payroll • examine the function of accounts receivable and accounts payable in relation to cash flow.		Ch. 10-11	Ch. 16, pp. 325-332; TM pp. 149-155	10 Ch. 14 24 Ch. 15 19 pp. 290-303

Suggested Instructional Strategies and Learning Activities	Support Network
• Create a list of employer-employee expectations. • Obtain past business records and analyze them for accounting procedures. Design an alternative accounting procedure. • Evaluate the banking services available by designing a checklist to see which best suits needs. • Complete various forms, such as shares, cheques, deposits, receipts, that are used in keeping track of company finances. • List and explain the various deductions involved in payroll. • Create a company payroll from information provided. • Analyze and discuss case studies of small business cash flow affected by accounts payable or accounts receivable. • Explain profit and loss, using a simulation. • Complete a profit and loss statement, using information provided. • Complete a sample balance sheet.	• Visit various banking institutions to investigate the different types of services available to a venture operator.

MODULE 7: MANAGING THE VENTURE (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Monitoring	<i>The student will:</i> • examine various venture plans and identify factors in the venture plan that require monitoring: - cash flow - customer/client satisfaction - human resources effectiveness - other • set a time line indicating when and how often each factor would be monitored • propose adjustments to remedy inconsistencies			Ch. 16, pp. 324-338; TM pp. 149-155	

Suggested Instructional Strategies and Learning Activities	Support Network
● Examine the venture plans that were prepared as part of this course. ● Examples of information sought from each plan: - what kind of business is it? - what is (are) the stated purpose(s)? - what is the product or service? - what are some planned marketing strategies? ● list them - what facility and/or equipment is required? - how is the venture being financed? ● Instead of, or as well as, examining plans, the students could: - listen to a guest speaker; e.g., entrepreneur, banker, accountant - visit a venture in groups of three or four - view films - examine ventures underway in the community. ● Identify factors that could affect the progress of the venture: - discuss and prioritize them.	● Guest speaker on short-term financing. ● Guest speaker from Consumer and Corporate Affairs on types of credit.

MODULE 7: MANAGING THE VENTURE (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Monitoring (continued)	• examine external factors that may affect the venture: - fluctuating economy - fads - seasonal variations • propose adjustments to remedy inconsistencies • develop strategies for changing a plan in progress • compare and assess financial alternatives • discuss circumstances when it may be appropriate to downsize or terminate the venture • formulate a plan addressing the requirements and responsibilities involved in downsizing or terminating a venture.		Ch. 4	Ch. 17	

Suggested Instructional Strategies and Learning Activities	Support Network
• Prepare a time line that identifies appropriate intervals for monitoring. • Analyze case studies of failed ventures, and suggest how failure could have been prevented. • List external factors that might have an affect on the venture. • Discuss how external factors could affect the venture. • Develop strategies for changing a venture plan in progress as a result of: - a business partner dieing suddenly - an outbreak of war - an act of God - an insufficient insurance coverage. • Identify and assess financing alternatives necessitated by unforeseen events.	• Bring an entrepreneur to class to talk about his or her business successes and/or failures.

MODULE 8: EXPANDING THE VENTURE

Theme: Making It Happen

Status: Expansion (Advanced Level)

The student will:

- analyze the rationale for expanding a particular venture, taking into consideration:
 - personal criteria:
 - values
 - goals
 - expertise
 - economic criteria
 - financial considerations
 - social/ethical considerations
 - personal definition of a "successful" venture
- compare personal philosophy with venture goals
- evaluate the options available, and develop an expansion strategy. Analysis could include:
 - managing, financing, promotion strategies
 - vertical or horizontal expansion
 - diversification
- implement an expansion of a particular venture
- assess the elements of "success" (as personally defined) of the expanded venture.

MODULE OVERVIEW

This module assumes that a particular venture has been successful, and the students are interested in exploring the opportunities for expansion. They learn to recognize the conditions indicative of expansion opportunities and undertake a decision-making process to verify the indicators, develop an expansion plan, and implement the expansion.

It is possible for students to build upon a venture undertaken at intermediate levels.

Key to "Resources" Column

See Print and Audio-visual section for full bibliographic annotation. Bold numbers correspond with resources in this list. Ch. = Chapter; BLM = Blackline Master; TM = Teacher's Manual.

MODULE EVALUATION STRATEGIES

This module is based on process-oriented activities; therefore, evaluations should be based on participation, presentations, projects and group work. Formal evaluation should be kept to a minimum. Self-evaluation by the students should be incorporated into different phases of this module.

MODULE 8: EXPANDING THE VENTURE

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Analyzing Expansion Potential	<i>The student will:</i> • analyze the rationale for expanding a particular venture, taking into consideration: - personal criteria: • values • goals • expertise - economic criteria - financial considerations - social/ethical considerations - personal definition of a "successful" venture • compare personal philosophy with venture goals • evaluate the options available for expansion: - vertical or horizontal expansion - diversification.		Ch. 14	Ch. 18, pp. 365-374; TM pp. 162-163	
			Ch. 2, 14		

Suggested Instructional Strategies and Learning Activities	Support Network
• Use the "Jigsaw" method to analyze the rationale of expansion. Divide the concept of expansion into small parts. Each part is assigned to a group of students who become the class experts on that part. Each group is responsible for sharing their expertise with others.	

MODULE 8: EXPANDING THE VENTURE (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Making the Decision	<i>The student will:</i> • recognize and appraise the conditions that indicate the possibility for expansion • predict the impact of expansion on the roles within the venture • formulate realistic goal expectations for expansion • propose possible directions for expansion.	Ch. 14 Case Studies 90, 268, 342 BLM 4-5, 26, 28, 35		Ch. 16, 18	

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Suggested Instructional Strategies and Learning Activities	Support Network
• Select one or more case studies that can be analyzed in terms of expansion feasibility. Using the "Think/Pair/Share" strategy, give the students a series of questions and/or internal and external factors to consider. Students jot down their ideas, then each student forms a partnership with another, and discusses the information. When this is completed, the information can be shared with the entire class or each partnership can team up with another pair and share information. This technique may be useful in analyzing: - method and/or type of expansion - means of diversification - resources available - impact of the expansion. • Divide the class into small groups. Each group becomes the board of directors for a particular organization preparing for expansion. A meeting is established to: - formulate realistic goal expectations for expansion - propose possible directions for expansion. The extent, timing and nature of the expansion can then be proposed to "Top Management". The top management could be the class or a group of experts from the community.	

MODULE 8: EXPANDING THE VENTURE (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Developing the Expansion	<i>The student will:</i> • examine the limitations resulting from the type of venture involved • design a plan for implementing the expansion • formulate a strategy to achieve the expansion: - managing - financing - promotion • implement the expansion of a particular venture.	Ch. 1, 6, 14 Case Studies 90, 268, 342 BLM 4, 17			
Monitoring and Assessing the Expansion	<i>The student will:</i> • investigate the social consequences • analyze the degree of success in achieving the financial goals • assess the elements of "success" (as personally defined) of the expanded venture • predict the need for future/continued expansion.	Ch. 6, 14 Case Studies 289, 332, 342		Ch. 18	

Suggested Instructional Strategies and Learning Activities	Support Network
• Review the concept of business plans, and develop a framework for the components of a business plan to expand a venture. • Study a business that has expanded, in order to determine the process used. • Analyze case studies of venture expansions, both successful and not so successful, to determine the risks involved. • Design a market research study to determine the feasibility for success of a specific venture expansion.	• Invite the owner of an expanding venture to speak about the issues of expansion. • Invite a guest speaker from an economic development department to speak about expansion support available from government agencies.
• Review the key concepts from "Monitoring", in Module 7, and discuss their applicability to expanding ventures. • Compare a venture's financial statements from before, during and after an expansion. • Examine the social impact of venture expansion; e.g., new jobs, increased pollution, greater market access.	• Interview various community resource persons to obtain their advice about monitoring ventures: - bank managers - chief financial officers - accountants - lawyers.

MODULE 8: EXPANDING THE VENTURE (continued)

Concept	Specific Learner Expectations	Resources			
		Bodell 11	Kretchman 28	Liepner 29	Additional
Franchising	<i>The student will:</i> • examine the concept of franchising as a means of expanding business • evaluate the benefits and risks • examine the process of establishing franchises.		Ch. 8	Ch. 12, pp. 235-240; TM pp. 112-113 Ch. 12, pp. 242-243; TM p. 113 Ch. 12, pp. 238-242; TM pp. 112-113	13 Ch. 7

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Suggested Instructional Strategies and Learning Activities	Support Network
● Examine case studies of various kinds of franchises; e.g., food service outlets, automotive repair services, real estate agencies: - financial requirements - franchiser obligations - franchisee obligations - risks. ● Interview owners of franchise businesses. ● Invite a panel of franchise owners to speak about their ventures. ● Debate the pros and cons of owning a franchise. ● Answer a franchise advertisement in a newspaper to obtain information, and report to the class on the findings. ● Investigate franchise fraud. ● Research a franchise you would like to own, and report to the class.	● Check the <i>Talking Yellow Pages</i> for possible sources of franchises; also check: - <i>The Globe and Mail</i> - <i>The Financial Post</i>. ● Invite a speaker from a fraud squad or someone from Consumer and Corporate Affairs.

LEARNING RESOURCES

POLICY

Alberta Education selects, acquires, develops, produces, translates and authorizes the best possible instructional materials for the implementation of approved programs of study.

INSTRUCTIONAL MATERIALS

Instructional materials are those print and non-print resources used to facilitate teaching and learning, such as student resources, teaching resources, audio-visual equipment, computer equipment, etc. Two subsets of instructional materials are student learning resources and teaching resources.

Student Learning Resources

Student learning resources are print or non-print instructional materials used by students during the implementation of provincial programs of study, such as books, films, videotapes, slides, computer programs, videodiscs or manipulatives. The three categories of student learning resources are: **Basic Learning Resources**, **Support Learning Resources** and **Other Learning Resources**.

Basic Learning Resources

Basic learning resources are those student learning resources authorized by Alberta Education as the most appropriate for addressing the majority of learner expectations of course(s), substantial components of course(s), or the most appropriate for meeting general learner expectations across two or more grade levels, subject areas, or programs as outlined in provincial programs of study. These may include any resource format, such as print, computer software, manipulatives or video.

Support Learning Resources

Support learning resources are those student learning resources authorized by Alberta Education to assist in addressing some of the learner expectations of course(s) or components of course(s); or assist in meeting the learner expectations across two or more grade levels, subject areas, or programs as outlined in the provincial programs of study.

Other Learning Resources

Other learning resources are those learning resources identified by Alberta Education as useful for teachers in the implementation of a course(s) or program(s) of study, but which have not undergone review procedures by Alberta Education. Alberta Education does not accept responsibility for use of these resources with students.

Teaching Resources

Teaching resources are print or non-print instructional materials containing pedagogical suggestions and used by such groups as teachers, administrators, parents and school/community groups in implementing provincial programs of study. Examples include teacher resource manuals, teacher guides, monographs, kits, newsletters and booklets.

There is only one category of teaching resources approved by Alberta Education, and this is referred to as "Authorized Teaching Resources". Non-authorized teaching materials are called "Other Teaching Resources" and evaluation rests with the user.

The titles of additional instructional materials, identified with a bullet (●) in the Print and Audio-visual section of this document, were provided through the courtesy of Alberta teachers. This listing is not to be construed as an explicit or implicit departmental approval for use. These titles are provided as a service only to assist local jurisdictions to identify resources that contain potentially useful ideas for teachers. The responsibility to evaluate these resources prior to selection rests with the user, in accordance with any existing local policy.

PRINT AND AUDIO-VISUAL

The following print and audio-visual learning resources have been identified as instructional materials for Enterprise and Innovation.

A star (★) indicates "basic" status, and a bullet (●) indicates additional instructional materials.

A reference number is assigned to each resource and is used consistently throughout this document.

Ref.No.	Cat.	Resources	Module
1	●	Alberta Career Development and Employment. <i>Are You Cut Out to Be an Entrepreneur: A Practical Self-assessment Guide</i> . Edmonton, AB: Career Programs and Resources, 1988. [Copies available from Alberta Education, Learning Resources Distributing Centre.] This workbook is designed to help students explore whether or not they have some of the characteristics of an entrepreneur.	1
2	●	Alberta Career Development and Employment. <i>Rural Women as Business Entrepreneurs: Leaders' Guide and Workshop Manual</i> . Edmonton, AB: Women's Career Resources, 1990.	7
3A	●	Alberta Economic Development and Trade. <i>Financing a Small Business</i> . Edmonton, AB: Small Business and Industry Division, September 1988. This handbook is one of a series of seven. While it does not take the place of experts, it does highlight some of the important financial considerations of which new business people should be aware for the welfare of their companies.	3, 5
3B	●	Alberta Economic Development and Trade. <i>Starting a Small Business</i> . Edmonton, AB: Small Business and Industry Division, September 1988.	2-3
4	●	Alberta Economic Development and Trade. <i>Marketing for a Small Business</i> . Edmonton, AB: Small Business Division, 1989.	2-3, 6
5	●	Alberta Tourism and Small Business. <i>Financing a Business in Alberta</i> . Edmonton, AB: Small Business Division, 1986.	2-4
6	●	Armstrong, Michael. <i>How to Be an Even Better Manager: Improve Performance, Profits, and Productivity</i> . Second edition. Vancouver, BC: Self-Counsel Press, 1990. This book deals individually with each of the management functions and with all the techniques and skills required of a manager. Subjects are dealt with in alphabetical order for ease of reference.	2-3, 7
7	●	Barker, Joel. <i>Paradigms: Discovering the Future</i> . Toronto, ON: Kinetic, 1990. "Paradigms" (rules we take for granted) may become so deeply rooted, so unquestioned, that they can become barriers to our ability to see new opportunities. This 38-minute video explains the implications of paradigms and future success.	1

Ref.No.	Cat.	Resource	Module
8	•	Barker, Joel. <i>Power of Vision</i> . Toronto, ON: Kinetic, 1990. This 30-minute video shows how a meaningful vision empowers us to solve problems and accomplish goals. It shows what helps and what inhibits an individual's ability to manage change and shape his or her own future.	1
9	•	Beckman, M. Dale, David L. Kurtz and Louis E. Boone. <i>Foundations of Marketing</i> . Fourth edition. Toronto, ON: Holt, Rinehart and Winston of Canada, Limited, 1988. This textbook deals with how organizations, both profit and non-profit, are studying and applying marketing knowledge in order to identify their clients and provide them with needed services. The major emphasis is on consumer behaviour and elements of the marketing mix. Case studies and a technical appendices are included. Computer problems are also included and a software marketing disk is available. A teaching-learning package is also available that includes a student study guide, instructor's manual, a test bank and transparencies.	6
10	•	Bilyea, Cliff G. <i>The Canadian Manager: Effectiveness in Action</i> . Toronto, ON: John Wiley and Sons Canada, 1980. This text draws examples from Canadian companies to illustrate business principles. Geared more toward college and university students, it considers the complexities surrounding the manager in both the public and private sectors of our economy. Hands-on examples indicate how business concepts interact with organizational realities. Four major parts cover an overview of business and management, aspects of management, spheres of management, and the environment of business.	7
11	★	Bodell, Richard W., Gary W. Rabbior and Larry W. Smith. <i>Entrepreneurship: The Spirit of Adventure</i> . Toronto, ON: Harcourt Brace Jovanovich Canada Inc., 1991. Textbook Teacher's Guide The textbook explores what entrepreneurs have accomplished and what has motivated them to achieve their objectives. Five major units cover what an entrepreneur is, innovation and entrepreneurship, opportunities and ideas, entrepreneurial planning and entrepreneurial skills within organizations. Individual chapters include key concepts; attitudes, skills and abilities; profiles; and case studies.	1-8
12	•	Breen, George Edward and Albert B. Blankenship. <i>Do-it-yourself Marketing Research</i> . Third edition. New York, NY: McGraw-Hill, Inc., 1989. This book is a practical guide that shows the non-professional how to do <u>enough</u> marketing research—and how to do it in a semiprofessional and unbiased manner.	4

Ref.No.	Cat.	Resource	Module
13	•	Burch, John G. <i>Entrepreneurship</i> . New York, NY: John Wiley and Sons, Inc., 1986. The aim of this textbook is to present the necessary steps to help put venture building blocks together and keep them together; how to prepare and present a business plan for a venture idea; and how to raise capital and launch a successful venture. Topics covered are entrepreneurship and the entrepreneur; product/service creation and evaluation; means of entering business; promising entrepreneurial opportunities; legal and financial considerations; and preparation and presentation of a business plan.	1-8
14	•	Campbell, Margaret F. <i>Home Economics Curriculum Activities Kit</i> . West Nyack, NY: Center for Applied Research in Education, 1990.	6-7
15	•	Canadian Co-operative Association. <i>Co-operative Entrepreneurship: A Case Study in Worker Ownership</i> . Ottawa, ON: Co-operative Outlook Series, January 1990. Based on events surrounding the origination of the Big Carrot, a natural food market in Toronto, this booklet introduces students to an example of Canadian entrepreneurship: the worker-owned cooperative. It takes students through a typical business start-up process; defining objectives, carrying out a feasibility study, creating the business plan and accumulating finances. The questions and activities provide opportunity to explore the stages of setting up a small business, and each part concludes with an activity that focuses on task-oriented groups and the group process.	1-2, 4-5
16	★	Canadian Foundation for Economic Education. <i>Entrepreneurship for Canadians: The Spirit of Adventure</i> . Toronto, ON: 1989. Series of six videos profiling Canadian entrepreneurs. One teacher inservice video. The user's guide provides suggested teaching strategies.	1-8
17	•	CB Media Ltd. <i>Profit</i> . A magazine formerly known as <i>Small Business</i> . Toronto, ON.	4
18	•	Canadian Bankers' Association (The). <i>Financing a Small Business: Working with Your Bank</i> . Toronto, ON: 1989.	2, 5
19	•	Church, Olive D. <i>Small Business Management and Entrepreneurship</i> . Chicago, IL: Science Research Associates, Inc., 1984. This text integrates the knowledge and skills from accounting, business law, communications, economics, finance, human relations, management, marketing, office systems, personnel management and psychology within the overall topics of planning, organizing, financing, managing and controlling of a small enterprise. The central focus is on the preparation of a comprehensive and realistic business plan.	7

Ref.No.	Cat.	Resource	Module
20	•	Churchill, Gilbert A. (Jr.). <i>Basic Marketing Research</i>. Chicago, IL: The Dryden Press, 1988. This text is a modular approach to marketing research for aspiring managers and researchers. It is broken into seven stages: formulating the problem, determining research design, determining data-collection methods, designing data-collection forms, designing a sample and collecting data, analyzing and interpreting data, and preparing a research report.	4
21	•	Cranson, Lori. <i>Managing for Excellence: The Fundamentals of Canadian Business Management</i>. Toronto, ON: McGraw-Hill Ryerson Limited, 1988. This text provides an overview of a broad range of business management concepts and how they are practised in Canada as well as those modified or adopted from other countries. Each chapter is self-contained for course design flexibility. A teacher's resource manual is also available.	3, 7
22	•	CTV. <i>Young Entrepreneurs</i>. Toronto, ON: Shirley, 1990. A panel of young entrepreneurs tell their success stories. They also discuss the hurdles and obstacles that they had to overcome. 48-minute video. [It is suggested that the first 30 minutes are most relevant.]	1-2
23	•	Eckert, Lee A., J. D. Ryan, Robert J. Ray and Robert J. Bracey. <i>Canadian Small Business: An Entrepreneur's Plan</i>. Toronto, ON: Harcourt Brace Jovanovich Canada Inc., 1987. The purpose of this text is to make students "street smart" about creating, managing and gaining profit from a business of their own. Students are led, step by step, through the creation of a business plan. Some chapters serve as building blocks while others provide background on financial information, microcomputers in small business, exporting and use of government programs. Additional aids include a running glossary, graphics, student study guide and instructor's manual with test bank.	2, 7-8
24	•	Everard, Kenneth E. and Bernard A. Shilt. <i>Business Principles & Management</i>. Seventh edition. Cincinnati, OH: South-Western Publishing Co., 1979. Each chapter in this text is introduced with performance objectives and the end of each unit provides careers material. The broad purpose is to present students with a foundation about what business is, how it operates, and how it is managed. Sample topics include the social, economic and legal environment of business, types of ownership, marketing considerations, financial aspects, communications, human resources and management functions.	7

Ref. No.	Cat.	Resource	Module
25	•	Fuhrman, Peter H. <i>Business in the Canadian Environment</i>. Third edition. Scarborough, ON: Prentice-Hall Canada Inc., 1989. The emphasis of this text is on providing a thorough overview of how business operates, as well as how it interacts with society and other nations. Each chapter begins with major points and specific learning objectives and ends with a list of key terms, review and discussion questions as well as case studies. The major units are foundations of business; business and management; business functions; business and its environment; and business in Canada—the future.	7–8
26	•	Jennings, William E. <i>Entrepreneurship: A Primer for Canadians</i>. Toronto, ON: Canadian Foundation for Economic Education, 1985. [This learning resource has been approved for CALM 20, Module 3, Entrepreneurship—Optional.] This publication has been written for secondary school teachers and students and for the general public. It is designed to assist in the introduction to and explanation of entrepreneurs. Included are a variety of Canadian case studies, both successes and failures; general entrepreneurial characteristics are examined and there is provision for self-assessment. Attention is also given to the process of developing a business plan.	1–4
27	•	Kao, Raymond W. Y. <i>Entrepreneurship and Enterprise Development</i>. Toronto, ON: Holt, Rinehart and Winston of Canada, Limited, 1989. This book makes the interconnection among small business, enterprise development and entrepreneurship. Advocating a life cycle approach to business ventures, it considers principal concepts, strategy, step-by-step development, research and development, as well as public policy and government intervention. There are case studies for each chapter.	7
28	★	Kretchman, M. Lily, Lori Cranson and Bill Jennings. <i>Entrepreneurship: Creating a Venture</i>. Toronto, ON: John Wiley and Sons, 1991. Textbook Student Workbook Teacher's Resource Package The basic premise of this publication is that entrepreneurial attributes can be acquired and improved in a school setting. Young people are led through a variety of business principles in creating, planning and preparing to launch their own ventures, whether a venture is for profit or not-for-profit. They are also provided with an opportunity to learn about themselves, set personal goals and develop entrepreneurial skills. All of the chapter activities and applications have been designed to encourage students to scan a wide range of alternatives, think creatively and critically, assess priorities and be creative in posing solutions to problems.	1–8

Ref. No.	Cat.	Resource	Module
29	★	Liepner, Michael, Herve De Jordy and Michael Schultz. <i>The Entrepreneurial Spirit</i> . Scarborough, ON: McGraw-Hill Ryerson Limited, 1991. Textbook Teacher Resource Manual This textbook exposes students to entrepreneurs and entrepreneurship. Many of the case studies and profiles provide insight into the skills, strengths and weaknesses displayed by entrepreneurs, such as perseverance, goal setting, persistence and confidence. It also provides insight into some of the entrepreneurial opportunities available in Canada and how to pursue them.	1-8
30	•	Lynn, Gary S. <i>From Concept to Market</i> . New York: John Wiley and Sons, Inc., 1989. This book is a practical, step-by-step guide through the product innovation process, from new idea to market. Awareness of the law is addressed by "how to": document, evaluate, test and perform a patent search; complete a market research; locate a potential licensee; write a business plan; and raise money.	2, 6-7
31	★	McIntyre Media. <i>All That Glitters</i> . Rexdale, ON: 1990. A high school economics class receives a first-hand lesson about the problems of running a business when their teacher sets up a class project. It is a great success until greed and ambition "at the top" destroy the morale of the workers, the quality of the project and the ethical behaviour of its leaders. [30-minute video]	1-7
32	•	Statistics Canada publications, such as <i>Metropolitan Edmonton</i> , <i>Metropolitan Calgary</i> , etc. Most recent editions.	2, 4
33	•	Ohio State University, Centre on Education and Training for Employment. <i>Promoting the Business</i> .	6
34	•	Royal Bank of Canada. <i>Advertising and Sales Promotion for Independent Business: A Guide for Independent Business</i> . Montreal, PQ: 1979.	6
35	•	Royal Bank of Canada. <i>How to Finance Your Business: A Guide for Independent Business</i> . Montreal, PQ: 1983.	2, 5
36	•	Royal Bank of Canada. <i>Your Money Matters</i> . Montreal, PQ: 1977.	2, 5, 7
37	•	Royal Bank of Canada Series: <i>Your Business Matters</i> . Montreal, PQ: 1975. Managing Time Good Management—Your Key to Survival Productivity and Profit Starting a Business	2, 7

Ref. No.	Cat.	Resource	Module
38	•	Taller, Terry. <i>Business in Changing Times</i> . Don Mills, ON: Addison-Wesley, 1987.	3, 7
39	•	TV Ontario. <i>Front Runners: The Kettle Creek Canvas Company</i> . 1986. Video and Teacher's Guide	4
40	•	Young, Kent et al. <i>The Business Simulation: Participant's Guide</i> . Toronto, ON: McGraw-Hill Ryerson Limited, 1985.	7
41	•	Luczkiw, Gene. <i>Creativity in Business</i> . Toronto, ON: Copp Clark Pitman Ltd., 1992. A highly practical, hands-on approach which includes case studies, questionnaires and activities, all in a three-ring binder format. Provides a solid base for developing an understanding and appreciation of entrepreneurship and the entrepreneurial process.	1-3, 5-7

RESOURCE CORRELATION

Ref. No.	Title	Module								Learning	Teaching
		1	2	3	4	5	6	7	8		
34	<i>Advertising and Sales Promotion for Independent Business: A Guide for Independent Business</i>						•				✓
31★	<i>All That Glitters</i> [video]	•	•	•	•	•	•	•		✓	✓
1	<i>Are You Cut Out to Be an Entrepreneur: A Practical Self-assessment Guide</i>	•								✓	
20	<i>Basic Marketing Research</i>				•						✓
25	<i>Business in the Canadian Environment</i>							•	•		✓
38	<i>Business in Changing Times</i>			•				•			✓
24	<i>Business Principles & Management</i>							•			✓
40	<i>Business Simulation: Participant's Guide (The)</i>							•			✓
10	<i>Canadian Manager: Effectiveness in Action (The)</i>							•			✓
23	<i>Canadian Small Business: An Entrepreneur's Plan</i>		•					•	•		✓
15	<i>Co-operative Entrepreneurship: A Case Study in Worker Ownership</i>	•	•		•	•					✓
41	<i>Creativity in Business</i>	•	•	•		•	•	•		✓	✓
12	<i>Do-it-yourself Marketing Research</i>				•						✓
29★	<i>Entrepreneurial Spirit (The)</i> [text/teacher resource manual]	•	•	•	•	•	•	•	•	✓	✓
13	<i>Entrepreneurship</i>	•	•	•	•	•	•	•	•		✓
16★	<i>Entrepreneurship for Canadians: The Spirit of Adventure</i> [video/user's guide]	•	•	•	•	•	•	•	•	✓	✓
28★	<i>Entrepreneurship: Creating a Venture</i> [text/student workbook/teacher manual]	•	•	•	•	•	•	•	•	✓	✓
27	<i>Entrepreneurship and Enterprise Development</i>							•			✓
26	<i>Entrepreneurship: A Primer for Canadians</i>	•	•	•	•						✓
11★	<i>Entrepreneurship: The Spirit of Adventure</i> [text/guide]	•	•	•	•	•	•	•	•	✓	✓
5	<i>Financing a Business in Alberta</i>		•	•	•						✓
3A	<i>Financing a Small Business</i>			•		•					✓
18	<i>Financing a Small Business: Working with Your Bank</i>		•			•					✓
9	<i>Foundations of Marketing</i>						•				✓

RESOURCE CORRELATION (continued)

Ref. No.	Title	Module								Learning	Teaching
		1	2	3	4	5	6	7	8		
30	<i>From Concept to Market</i>		•				•	•			✓
39	<i>Front Runners: The Kettle Creek Canvas Company</i>				•					✓	✓
14	<i>Home Economics Curriculum Activities Kit</i>						•	•			✓
6	<i>How to Be an Even Better Manager: Improve Performance, Profits, and Productivity</i>		•	•				•			✓
35	<i>How to Finance Your Business: A Guide for Independent Business</i>		•			•					✓
21	<i>Managing for Excellence: The Fundamentals of Canadian Business Management</i>			•				•			✓
4	<i>Marketing for a Small Business</i>		•	•			•				✓
7	<i>Paradigms: Discovering the Future</i> [video]	•								✓	✓
8	<i>Power of Vision</i> [video]	•								✓	✓
17	<i>Profit</i> [magazine]				•						✓
33	<i>Promoting the Business</i>						•				✓
2	<i>Rural Women as Business Entrepreneurs: Leaders' Guide and Workshop Manual</i>							•			✓
19	<i>Small Business Management and Entrepreneurship</i>							•			✓
3B	<i>Starting a Small Business</i>		•	•							✓
32	Statistics Canada publications		•		•						✓
22	<i>Young Entrepreneurs</i> [video]	•	•							✓	✓
37	<i>Your Business Matters</i>		•					•			✓
36	<i>Your Money Matters</i> [kit]		•			•		•			✓

ADDITIONAL RESOURCES AND SOURCES

Available to Enterprise and Innovation teachers, both locally and provincially, are many resources that can be used to enhance Career and Technology Studies courses. These resources can be accessed through government agencies, resource centres and organizations.

Teacher-Librarians

Planned and purposeful use of library resources helps students grow in their ability to gather, process and share information. Research activities require access to an adequate quantity and variety of appropriate, up-to-date print and non-print resources from the school library, other libraries, the community and additional sources. Some techniques to consider are:

- planning together
- establishing specific objectives
- integrating research skills into planning.

Cooperation between the teacher-librarian and the subject area teacher in the development of effectively planned resource-based research activities ensures that students are taught the research skills as well as the subject content. Also see *Focus on Research: A Guide to Developing Students' Research Skills* referenced in the Alberta Education Related Documents section.

ALBERTA EDUCATION RESOURCES

Regional Offices

Assistance and information is available through the five regional offices of Alberta Education. They may be able to help teachers by facilitating:

- workshops in specific areas of curriculum
- information and direction on resources, facilities and program implementation
- program evaluation
- contacts with other Career and Technology Studies teachers.

Zone I

Grande Prairie Regional Office
Alberta Education
12th Floor, 214 Place
9909 - 102 Street
Grande Prairie, Alberta
T8V 2V4
Telephone: 538-5130
Fax: 538-5135

Zones II and III

Edmonton Regional Office
Alberta Education
Westcor Building
12323 Stony Plain Road
Edmonton, Alberta
T5N 3Y5
Telephone: 427-2952
Fax: 422-9682

Zone IV

Red Deer Regional Office
Alberta Education
3rd Floor West
Provincial Building
4920 - 51 Street
Red Deer, Alberta
T4N 6K8
Telephone: 340-5262
Fax: 340-5305

Zone V

Calgary Regional Office
Alberta Education
Room 1200, Rocky Mountain Plaza
615 Macleod Trail SE
Calgary, Alberta
T2G 4T8
Telephone: 297-6353
Fax: 297-3842

Zone VI

Lethbridge Regional Office
Alberta Education
Provincial Building
200 - 5 Avenue South
Lethbridge, Alberta
T1J 4C7
Telephone: 381-5243
Fax: 381-5734

Language Services
Alberta Education
Devonian Building
11160 Jasper Avenue
Edmonton, Alberta
T5K 0L2
Telephone: 427-2940
Fax: 422-1947

Note: Alberta Government telephone numbers can be reached free of charge by calling the **RITE** number switchboard in your area.

ALBERTA EDUCATION RELATED DOCUMENTS

The following monographs are available for purchase from:

Learning Resources Distributing Centre
12360 - 142 Street
Edmonton, Alberta
T5L 4X9
Telephone: 427-2767
Fax: 422-9750

Please consult the "Support Documents" section or the "Legal, Service and Information Publications" section in the *Buyers Guide* for ordering information and costs.

Developmental Framework Documents

- *The Emerging Student: Relationships Among the Cognitive, Social and Physical Domains of Development*, 1991

This document looks at the whole child, or student, as a productive learner, integrating all the domains of development—cognitive, social and physical. It emphasizes the need

for providing balanced curriculum and instruction.

- *Students' Interactions Developmental Framework: The Social Sphere*, 1988

This document focuses on the student as a social being. It looks at the student's affective or emotional growth, explores interpersonal or social growth and, finally, examines moral development. These three domains make up the social sphere.

- *Students' Physical Growth: Developmental Framework Physical Dimension*, 1988

This document examines children's normal physical growth in three areas: perceptual, structural and motor development. In none of these areas is the child's growth a single continuous curve throughout the first two decades of life. Physical growth is characterized by periods of rapid growth and periods of slower growth. Consequently, differences and changes in growth patterns may affect the timing of certain learning processes.

- *Students' Thinking: Developmental Framework Cognitive Domain*, 1987

This document explores children's cognitive development from infancy to adolescence. The Piagetian stages of pre-operational, concrete operational and formal operational thinking are explained. Suggestions for improving the learning process are also presented.

Others

- *Focus on Research: A Guide to Developing Students' Research Skills*, 1990

This document outlines a resource-based research model that helps students manage information efficiently and effectively, and in this process, to gain skills that are transferable to all school and work situations. The model provides a developmental approach to teaching students how to do research. Also see Teacher-Librarians in the Additional Resources and Sources section.

- *Teaching Thinking: Enhancing Learning*, 1990

Principles and guidelines for cultivating thinking, ECS to Grade 12, have been developed in this resource. It offers a definition of thinking, describes nine basic principles on which the suggested practices are based, and discusses possible procedures for implementation in schools and classrooms.

NATIONAL FILM BOARD OF CANADA (NFB)

The National Film Board of Canada (NFB) has numerous films and videotapes that may be suitable for Enterprise and Innovation. The Alberta library is located at:

NFB Library
Canada Place
Suite 120
9700 Jasper Avenue
Edmonton, Alberta
T5J 4C3
Telephone: 495-3010
Fax: 495-5084

The western and northern Canada toll free number, excluding Edmonton:

1-800-661-9867

ACCESS Network and some school boards have acquired duplication rights to *some* NFB videotapes. Please consult the relevant catalogues in your school or school district.

NFB has two Alberta offices, one in Edmonton and one in Calgary. For further information, contact the Education Marketing Officer in either office.

NFB Listings

For a listing of NFB films and videotapes indexed by title, subject and director, consult the nearest NFB office.

Edmonton Office

National Film Board of Canada
Production and Marketing

Suite 120-2
Canada Place
9700 Jasper Avenue
Edmonton, Alberta
T5J 4C3
Telephone: 495-3013
Fax: 495-6412

Partner Library

The Calgary Public Library has a selection of NFB films and videotapes which can be borrowed free of charge with a Calgary Public Library borrower's card. For further information, contact:

Calgary Public Library
Films and Recordings Department
616 Macleod Trail SE
Calgary, Alberta
T2G 2M2
Telephone: 260-2650
Fax: 292-5458

Presentations

Education Marketing Officers located in Calgary and Edmonton are available, province wide, for workshops, conferences, professional development days and comparable activities.

ACCESS NETWORK

ACCESS Network offers a variety of resources and services to teachers. For a nominal dubbing and tape fee, teachers may have ACCESS Network audio and video library tapes copied.

ACCESS Network publishes listings of audio and video cassettes as well as a comprehensive programming schedule.

The programs listed and accompanying support material can be obtained from:

ACCESS Network
Dub/Media Resource Centre
295 Midpark Way SE
Calgary, Alberta
T2X 2A8
Telephone: 256-1100 (inside Calgary)
Telephone: 1-800-352-8293
(outside Calgary)
Fax: 256-6837

URBAN RESOURCE CENTRES

Calgary Board of Education
Supervisor, Education Media
3610 - 9 Street SE
Calgary, Alberta
T2G 3C5
Telephone: 294-8540
Fax: 287-9739

Calgary Separate School Board
Supervisor, Instructional Materials
6220 Lakeview Drive SW
Calgary, Alberta
T3E 5T1
Telephone: 246-6663
Fax: 249-3054

County of Strathcona
Director, Learning Resource Service
2001 Sherwood Drive
Sherwood Park, Alberta
T8A 3W7

Edmonton Public School Board
Learning Resource Consultant
Centre for Education
One Kingsway Avenue
Edmonton, Alberta
T5H 4G9
Telephone: 429-8320
Fax: 429-8318

Lakeland School District No. 5460
Area Superintendent
Postal Bag 1001
6005 - 50 Avenue
Bonnyville, Alberta
T9N 2L4
Telephone: 826-3145
Fax: 826-4600

Medicine Hat School District No. 76
IMC Manager
601 - 1 Avenue S/W
Medicine Hat, Alberta
T1A 4Y7
Telephone: 526-1323
Fax: 529-5339

Red Deer Public School Board
Coordinator of Instruction
4747 - 53 Street
Red Deer, Alberta
T4N 2E6
Telephone: 343-1405
Fax: 347-8190

St. Anthony's Teacher Centre
Supervisor, Curricular Resources
10425 - 84 Avenue
Edmonton, Alberta
T6E 2H3
Telephone: 439-7356
Fax: 433-0181

REGIONAL RESOURCE CENTRES

Zone I

Zone I Regional Resource Centre
Film Supervisor
10020 - 101 Street
P.O. Box 6536
Peace River, Alberta
T8S 1S3
Telephone: 624-3187
Fax: 624-5941

Zones II and III

Central Alberta Media Services (CAMS)
Film Supervisor
182 Sioux Road
Sherwood Park, Alberta
T8A 3K5
Telephone: 464-5540
Fax: 467-5469

Zone IV

Alberta Central Regional Education Services
(ACRES)
Operations Manager
County of Lacombe
Parkland Regional Library Building
56 Avenue and 53 Street Corner
Box 3220
Lacombe, Alberta
T0C 1S0
Telephone: 782-5730
Fax: 782-5831

Zone V

South Central Alberta Resource Centre
(SCARC)
c/o County of Wheatland
435 B Hwy #1
Strathmore, Alberta
T1P 1J4
Telephone: 934-5028
Fax: 934-4889

Zone VI

Southern Alberta Learning Resource Centre
(SALRC)
Film Supervisor
Provincial Government Administration Building
Room 120
909 Third Avenue North
Box 845
Lethbridge, Alberta
T1J 3Z8
Telephone: 320-7807
Fax: 320-7817

OTHER LEARNING RESOURCES AND RESOURCE AGENCIES

The titles of the student learning resources identified below were provided through the courtesy of Alberta teachers. This listing is not to be construed as an explicit or implicit departmental approval for use. These titles are provided as a service only to assist local jurisdictions to identify resources that contain potentially useful ideas for teachers. The responsibility to evaluate these resources prior to selection rests with the user, in accordance with any existing local policy.

- Alberta Career Development and Employment
Information Development and Marketing
9th Floor, City Centre Building
10155 - 102 Street
Edmonton, Alberta
T5J 4L5
Telephone: 422-1794
Fax: 422-5126

Career Information Catalogue Update, 1989
The Career Planner
Career Programs and Resources [catalogue
for video, audio and women's resources]
Children Challenges Choice
The Entrepreneur [video]
Get a Job [video]
A Head for Business [video]
Positive Works
The Seven Phases of a Job Interview [video]
Skills Are Your Passport
Volunteerism: Building Futures

- Alberta Consumer and Corporate Affairs
Third Floor
Capilano Centre
9945 - 50 Street
Edmonton, Alberta
T6A 0L4
Telephone: 427-5782
Fax: 422-9106

There are also offices in Calgary, Camrose,
Fort McMurray, Grande Prairie, Lethbridge,
Medicine Hat, Peace River and Red Deer.

Publications for Consumers
Common Consumer Questions
Consumer Complaints: Both Sides of the Coin
The Co-operative Community [overview of co-ops]
Guarantees and Warranties
Help for Consumers [a description of the community services offered by Alberta Consumer and Corporate Affairs]

How to Use Credit Responsibly
Mom, Buy Me That! [parent's guide to children's advertising]
Shop Around
Taking Charge of Your Money
Truth in Advertising
2000 A.D.: A Guide to Financial Awareness
[teacher resource]

Publications for Businesses and Societies
[teacher resources]

Avoiding Business Scams and Frauds: A Guide for Small Businesses
Business Opportunities and Franchise Frauds
Introducing Corporate Registry
Preventing Unfair Trade Practices
Purchasing a Franchise

- Alberta Debate and Speech Association
202, 17308 - 108 Avenue
Edmonton, Alberta
T5X 3Y8
Telephone: 484-7929
Fax: 484-2710
- Alberta Economic Development and Trade
Strategic Planning and Research
9th Floor, Sterling Place
9940 - 106 Street
Edmonton, Alberta
T5K 2P6
Telephone: 422-9494
Fax: 422-5922
- Alberta Foundation for Economic Education
901, 10179 - 105 Street
Edmonton, Alberta
T5J 1E2
Telephone: 421-9331
Fax: 426-2987

The Chartered Banks and Canada's Economy
Labour in the Canadian Economy [teacher resource]
Retail Marketing in Canada
Using Money Wisely

- Alberta Human Rights Commission
Room 805, 10808 - 99 Avenue
Edmonton, Alberta
T5K 0G5
Telephone: 427-3116
Fax: 422-3563

Alberta Human Rights Commission
Main Floor, Dorchester Square
Room 102, 1333 - 8 Street SW
Calgary, Alberta
T2R 1M6
Telephone: 297-6571
Fax: 297-6567

Individual's Rights Protection Act

- Alberta Labour
Employment Standards Branch
Room 403
Princeton Place
10339 - 124 Street
Edmonton, Alberta
T5N 3W1
Telephone: 427-2723
Fax: 427-8837

Employment Standards Code [teacher resource package]

- Alberta Occupational Health and Safety
5th Floor
10709 Jasper Avenue
Edmonton, Alberta
T5J 3N3
Telephone: 427-2320; 427-3530
Fax: 427-5698

The Occupational Health and Safety Act and other related regulations
Occupational Health and Safety Magazine

There are also offices in Calgary, Edson, Fort McMurray, Grande Prairie, Lethbridge, Lloydminster, Medicine Hat, Red Deer, Vermilion.

- Alberta Women's Secretariat
8th Floor, Kensington Place
10011 - 109 Street
Edmonton, Alberta
T5J 3S8
Telephone: 422-4927

Stepping Stones Teacher's Kit [previously distributed to every school in Alberta in care of the school counsellor]

- Bank of Montreal
Communications Assistant
Public Affairs
P.O. Box 6002
Place d'Armes
Montreal, Quebec
H2Y 3S8
Telephone: (514) 555-1212

Money and Banking Modules [teacher resource—duplication permission granted when used by schools]

- Canadian Advertising Foundation
Suite 402
350 Bloor Street East
Toronto, Ontario
M4W 1H5
Telephone: (416) 961-6311
- Canadian Advisory Council on the Status of Women
110 O'Connor Street
9th Floor
Ottawa, Ontario
K1P 5M9
Telephone: (613) 992-4975
Fax: (613) 992-1715

Teacher Resources
Canadian Job Strategy 1987
Pay Equity
Planning Our Future
Women Entrepreneurs

- Canadian Bankers' Association
Suite 600
The Exchange Tower
P.O. Box 348
2 First Canadian Place
Toronto, Ontario
M5X 1E1
Telephone: (416) 362-6092
Fax: (416) 362-7705

*Helping You Bank
Starting a Small Business*

- The Canadian Chamber of Commerce
Suite 1160
55 Metcalfe Street
Ottawa, Ontario
K1P 6N4
Telephone: (613) 238-4000
Fax: (613) 238-7643
- Canadian Foundation for Economic Education
Suite 501
2 St. Clair Avenue West
Toronto, Ontario
M4V 1L5
Telephone: (416) 968-2236
Fax: (416) 968-0488

*BIZBALL: A Look at Basic Business and
Economics Concepts Via Major League
Baseball*

Entrepreneurship: A Primer for Canadians
[teacher resource]

*Labour Market: Teacher's Resource
Package* [teacher resource]

Money and Youth

Women in the Workforce

- Canadian Imperial Bank of Commerce
Commerce Court
Toronto, Ontario
M5L 1A2
Telephone: (416) 980-2211
Fax: (416) 861-3666
- The Canadian Manufacturers Association
Suite 102, 130 Albert Street
Ottawa, Ontario
K1P 5G4
Telephone: (613) 233-8423
Fax: (613) 233-6048

- The Conference Board of Canada
255 Smyth Road
Ottawa, Ontario
K1H 8M7
Telephone: (613) 526-3280
Fax: (613) 526-4857

Economic Forecast: Provincial Outlook
[provision of research reports, personalized
information services]

- The Edmonton Journal
10006 - 101 Street
Edmonton, Alberta
T5J 0S1
Telephone: 429-5100
Fax: 429-5318

*Down to Business
Newspaper in Education*

- Junior Achievement of Northern Alberta
22, 10210 - 117 Street
Edmonton, Alberta
T5K 1X6
Telephone: 482-7521
Fax: 488-5924

Junior Achievement of Southern Alberta
739 - 10 Avenue SW
Calgary, Alberta
T2R 0B3
Telephone: 263-2545
Fax: 261-6988

Materials are available only where Junior
Achievement has identified community
business consultants and provided inservice.

- Procter & Gamble Inc.
Educational Services
P.O. Box 355
Station "A"
Toronto, Ontario
M5W 1C5
Telephone: (416) 730-4711

Canadian Consumers and Their Marketplace:
100 Activity Ideas
Consumer Advertising
Consumer Choice

- Royal Bank of Canada
Public Affairs
335 - 8 Avenue SW
Calgary, Alberta
T2P 2N5
Telephone: 292-3493
Fax: 292-3017

Looking After Your Own Money
Your Business Matters [teacher resource series]
Your Money Matters Series
- *Making a Complaint*

- Rural Education and Development Association
14815 - 119 Avenue
Edmonton, Alberta
T5L 2N9
Telephone: 451-5959
Fax: 452-5385

List of speakers for schools.
Several modules on cooperatives and entrepreneurship.
Teacher resource package on cooperatives.

- Statistics Canada
Regional Office
8th Floor, Park Square
10001 Bellamy Hill
Edmonton, Alberta
T5J 3B6
Telephone: 495-3023
Fax: 495-5318

Canadian Social Trends

COMMUNITY AND REGIONAL ORGANIZATIONS

The local community and regional organizations should not be overlooked. A list of possibilities may include:

- agricultural service boards
- agriculture societies
- band councils
- business revitalization organizations
- chambers of commerce
- church organizations
- community and district support services
- community futures organizations
- community tourist action committees
- development cooperatives (local)
- economic development committees (local and regional)
- library boards
- recreation boards
- service clubs
- tourist zones and associations
- town councils
- volunteer organizations
- women's institutes.

COPYRIGHT ACKNOWLEDGEMENTS

Alberta Education wishes to thank the following authors, publishers and agents for granting permission to include copyrighted materials.

The Canadian Foundation for Economic Education for material adapted from *Enterprise for Canadians: The Spirit of Adventure*, User's Guide (1989).

The Federal/Provincial Consumer Education and Plain Language Task Force for material adapted from *Project Real World* (1991).

Allan Gibb for material adapted from *The Enterprise Culture and Education: Understanding Enterprise Education and Its Links with Small Business, Entrepreneurship and Wider Educational Goals* (1992).

APPENDIX A

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STUDENT COMPETENCY CHECKLISTS	
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MODULE 1: CHALLENGE AND OPPORTUNITY

Student Competency Checklist

(Student's Name)

has identified and enhanced the following knowledge, skills
and attitudes that foster enterprise and innovation.

Areas of Competency	Performance Indicators The student has:	Activity Reference Number	✓
THINKING CREATIVELY	• created a variety of unique ideas that addressed a need or opportunity		
	• added detail to an idea, plan or product		
	• simplified the key idea or problem		
	• deferred judgment until a situation or problem was fully understood		
RESEARCHING	• compared various means of entering business		
	• identified non-profit ventures		
	• described the components and process of creating a venture plan		
	• discussed regulations and responsibilities affecting ventures		
	• identified career options where Enterprise and Innovation are particularly important		
	• developed a personal profile of their own entrepreneurial/intrapreneurial potential		
MAKING DECISIONS SOLVING PROBLEMS SETTING GOALS	• compared and assessed a variety of venture opportunities		
	• prepared a feasibility analysis of a venture idea		
ORGANIZING PLANNING MANAGING COMMUNICATING TEAM BUILDING	• established needs, wants and priorities in relation to venture opportunities		

MODULE 2: PLANNING A VENTURE**Student Competency Checklist**

(Student's Name)

has identified and enhanced the following knowledge, skills
and attitudes that foster enterprise and innovation.

Areas of Competency	Performance Indicators The student has:	Activity Reference Number	✓
THINKING CREATIVELY	• added detail to an idea, plan or product		
	• simplified the key idea or problem		
	• deferred judgment until a situation or problem was fully understood		
	• demonstrated flexibility in considering a variety of ideas and alternatives		
RESEARCHING	• established a support network to implement a venture		
	• analyzed the market		
MAKING DECISIONS SOLVING PROBLEMS SETTING GOALS	• applied goal-setting and problem-solving strategies for a selected venture		
	• assessed potential risks and proposed strategies for minimizing risks		
	• analyzed and assessed the outcome of a venture plan presentation		
	• assessed the strengths and weaknesses of the venture		
	• developed a mission statement for the venture		
ORGANIZING PLANNING MANAGING COMMUNICATING TEAM BUILDING	• formalized operational policies consistent with the venture philosophy and business ethics		
	• completed a venture plan		

MODULE 3: MAKING IT HAPPEN

Student Competency Checklist

(Student's Name)

has identified and enhanced the following knowledge, skills
and attitudes that foster enterprise and innovation.

Areas of Competency	Performance Indicators	Activity Reference Number	✓
	The student has:		
THINKING CREATIVELY	• added detail to an idea, plan or product		
	• articulated ideas into the context of making a venture happen		
	• combined ideas in novel and unique ways		
	• persevered in searching for ideas and solutions		
RESEARCHING	• outlined the start-up requirements for the venture		
	• discussed legal obligations that affected the venture		
	• analyzed the common forms for business ownership		
	• analyzed why businesses fail, and illustrated the consequences of poor and/or inadequate planning		
	• identified career ladders for personnel		
	• examined personal/individual motives in relation to the development and creation of the venture		
	• related leadership strategies to venture analysis		
MAKING DECISIONS SOLVING PROBLEMS SETTING GOALS	• examined short- and long-range plans for the venture		
	• managed problem solving and decision making at each implementation stage of the venture		
	• assessed the venture		

MODULE 3: MAKING IT HAPPEN (continued)**Student Competency Checklist**

Areas of Competency	Performance Indicators The student has:	Activity Reference Number	✓
ORGANIZING PLANNING MANAGING COMMUNICATING TEAM BUILDING	established management procedures required to start the venture		
	formulated a market plan		
	designed a strategy for measuring, monitoring and controlling the venture		
	prepared a cash flow projection		
	discussed the functions of management		
	examined management models and leadership styles		
	demonstrated leadership qualities in implementing the venture		
	implemented a venture		
	prepared a written critique of the venture		

MODULE 4: ANALYZING VENTURES

Student Competency Checklist

(Student's Name)

has identified and enhanced the following knowledge, skills and attitudes that foster enterprise and innovation.

Areas of Competency	Performance Indicators The student has:	Activity Reference Number	✓
THINKING CREATIVELY	• deferred judgment until a situation or problem was fully understood		
	• demonstrated flexibility in considering a variety of ideas and alternatives		
	• extended the boundaries of the process to a new context		
RESEARCHING	• described and applied various methodologies for analyzing and evaluating ventures: – market analysis – industry analysis – financial analysis – human resources analysis – product/service evaluation		
	• conducted market research, collected both primary and secondary data, and indicated the advantages and disadvantages of each		
MAKING DECISIONS SOLVING PROBLEMS SETTING GOALS	• analyzed the research, compared a variety of ventures and made informed decisions about the feasibility of each venture		
	• selected the most feasible venture based on the analyzed data		
ORGANIZING PLANNING MANAGING COMMUNICATING TEAM BUILDING	• prepared a written critique, including an in-depth analysis and assessment of a venture		

MODULE 5: FINANCING VENTURES

Student Competency Checklist

(Student's Name)

has identified and enhanced the following knowledge, skills
and attitudes that foster enterprise and innovation.

Areas of Competency	Performance Indicators The student has:	Activity Reference Number	✓
THINKING CREATIVELY	created a variety of unique ideas that addressed a need or opportunity in a new context		
	added detail to an idea, plan or product		
	demonstrated flexibility in considering a variety of ideas and alternatives		
	extended the boundaries of the process to a new context		
	persevered in searching for ideas and solutions in a new context		
	examined assumptions to remove unnecessary restrictions and barriers		
RESEARCHING	became familiar with a glossary of terms relevant to financing ventures		
	examined various sources of equity capitals, and financial assistance		
	demonstrated the process of applying for different types of financing		
	distinguished between fixed and variable costs		
	formulated and explained a "break even analysis" for ventures		
	- distinguished between: - short- and long-term financing - cash flow, and profit and loss statement		
	consulted with appropriate specialists		
MAKING DECISIONS SOLVING PROBLEMS SETTING GOALS	evaluated various financial options		
	chose the financial alternative that best met the needs of the venture		
	analyzed and assessed the outcome		

MODULE 5: FINANCING VENTURES (continued)**Student Competency Checklist**

Areas of Competency	Performance Indicators	Activity Reference Number	✓
	The student has:		
ORGANIZING PLANNING MANAGING COMMUNICATING TEAM BUILDING	• prepared a sample cash flow		
	• prepared and presented a financial plan for the venture		

MODULE 6: MARKETING THE VENTURE

Student Competency Checklist

(Student's Name)

has identified and enhanced the following knowledge, skills
and attitudes that foster enterprise and innovation.

Areas of Competency	Performance Indicators The student has:	Activity Reference Number	✓
THINKING CREATIVELY	• created a variety of unique ideas with ease		
	• added detail to enhance meaning and interest		
	• demonstrated flexibility in considering a variety of ideas and alternatives in a new context		
	• combined ideas in novel and unique ways in a new context		
	• persevered in searching for ideas and solutions		
RESEARCHING	• researched sources of assistance and information		
	• created a support network		
MAKING DECISIONS SOLVING PROBLEMS SETTING GOALS	• analyzed various marketing strategies for their applicability in terms of marketing mix for a target market		
	• applied the concept of marketing to a particular venture		
	• analyzed the relationship between marketing and other venture decisions		
	• summarized the decisions that had to be made when completing a marketing plan		
	• appraised the strengths and weaknesses of the marketing strategy, and revised as necessary		
	• analyzed cost/benefit factors in the selection of alternative marketing strategies		
	• compared the various techniques of promotion		

MODULE 6: MARKETING THE VENTURE (continued)**Student Competency Checklist**

Areas of Competency	Performance Indicators The student has:	Activity Reference Number	✓
ORGANIZING PLANNING MANAGING COMMUNICATING TEAM BUILDING	• formulated and implemented a marketing strategy for a particular venture		
	• formulated and implemented a promotional strategy, within a predetermined budget, for a particular venture		

MODULE 7: MANAGING THE VENTURE

Student Competency Checklist

(Student's Name)

has identified and enhanced the following knowledge, skills and attitudes that foster enterprise and innovation.

Areas of Competency	Performance Indicators The student has:	Activity Reference Number	✓
THINKING CREATIVELY	simplified/condensed the dominant or essential idea or problem in a new context		
	demonstrated flexibility in considering a variety of ideas and alternatives in a new context		
	examined assumptions to remove unnecessary restrictions and barriers in a new context		
	created a strategy for human resources recruitment and development		
	- designed a plan to encourage - team building - professionalism		
RESEARCHING	appraised government regulations		
	evaluated the marketing mix		
MAKING DECISIONS SOLVING PROBLEMS SETTING GOALS	evaluated the objectives and goals of the venture		
	differentiated between ethical and unethical business practices		
	- analyzed the organizational structure in terms of: - flexibility - suitability to type and size of venture - communication channels - decision-making process - efficiency		

MODULE 7: MANAGING THE VENTURE (continued)**Student Competency Checklist**

Areas of Competency	Performance Indicators The student has:	Activity Reference Number	✓
ORGANIZING PLANNING MANAGING COMMUNICATING TEAM BUILDING	created management procedures necessary to implement the venture		
	developed an organizational structure to achieve the goals and objectives of the venture		
	formulated a plan addressing the circumstances, requirements and responsibilities involved to downsizing or terminating the venture		
	applied and assessed the organizational plan		
	formulated and implemented a method of managing the finances of the venture		
	established and maintained effective internal/external communication functions		
	demonstrated leadership qualities		

MODULE 8: EXPANDING THE VENTURE

Student Competency Checklist

(Student's Name)

has identified and enhanced the following knowledge, skills
and attitudes that foster enterprise and innovation.

Areas of Competency	Performance Indicators The student has:	Activity Reference Number	✓
THINKING CREATIVELY	created a variety of unique ideas that addressed a need or opportunity in a new and larger context		
	added detail to an idea, plan or product in a new and larger context		
	deferred judgment until a situation or problem was fully understood in a new and larger context		
	demonstrated flexibility in considering a variety of ideas and alternatives in a new and larger context		
	examined assumptions to remove unnecessary restrictions and barriers in a new and larger context		
	extended the boundaries of the venture		
	predicted the need for future/continued expansion		
	predicted the impact of expansion on the roles within the venture		
RESEARCHING	appraised the limitations from the type of venture involved		
	investigated the social consequences of expansion		
	evaluated the concept and process of franchising as a means of expanding business		
	analyzed the rationale for expanding a particular venture		
	compared personal philosophy with venture goals		
MAKING DECISIONS SOLVING PROBLEMS SETTING GOALS	evaluated the available options		
	assessed the elements of "success" (as personally defined) of the expanded venture		

MODULE 8: EXPANDING THE VENTURE (continued)**Student Competency Checklist**

Areas of Competency	Performance Indicators The student has:	Activity Reference Number	✓
ORGANIZING PLANNING MANAGING COMMUNICATING TEAM BUILDING	● formulated realistic goal expectations for expansion		
	● proposed possible directions for expansion		
	● designed a plan for implementing the expansion		
	● formulated a strategy to achieve the expansion		
	● applied and assessed the organizational plan		
	● formulated and implemented a method of managing the finances of the venture		
	● demonstrated leadership qualities		
	● implemented the expansion of a particular venture		

MODULE 1: CHALLENGE AND OPPORTUNITY

SAMPLE ASSESSMENT PLAN

ASSIGNMENTS	WEIGHTING
Classroom Activities/Short Assignments • Bug Journal • Decision-making Assignment • Problem-solving Assignment • Case Study Analysis • Venture Opportunity Analysis • Non-profit Ventures Report • Means of Entering Business Comparison TOTAL	10 5 5 5 5 5 5 40
Projects • Venture Planning (Group Project) - Assessment: Self 5 - Peer 5 - Teacher 5 • Mini Venture Project (Individual Project) - Written Plan 5 - Feasibility Analysis 5 - Presentation 5 TOTAL	15 15 30
Entrepreneurial Portfolio • Assessment: Self 4 - Peer 4 - Other 2 (parent, employer, community leader) TOTAL	10
Performance Appraisals (see samples in Appendix B) • 5 appraisals	20
GRAND TOTAL	100

MODULE 1: CHALLENGE AND OPPORTUNITY

STUDENT COMPETENCY CHECKLIST

(Student's Name)

has identified and enhanced the following knowledge, skills
and attitudes that foster enterprise and innovation.

Areas of Competency	Performance Indicators The student has:	Activity Reference Number★	✓
THINKING CREATIVELY	• created a variety of unique ideas that addressed a need or opportunity	1, 6, 27	
	• added detail to an idea, plan or product	2, 3, 26	
	• simplified the key idea or problem	4, 7, 8, 9	
	• deferred judgment until a situation or problem was fully understood	3, 11, 17	
RESEARCHING	• compared various means of entering business	14, 15, 16, 17, 18	
	• identified non-profit ventures	15, 16	
	• described the components and process of creating a venture plan	21, 23, 24	
	• discussed regulations and responsibilities affecting ventures	21, 22	
	• identified career options where Enterprise and Innovation are particularly important	10, 20	
	• developed a personal profile of their own entrepreneurial/intrapreneurial potential	5, 12, 13, 19, 32	
MAKING DECISIONS SOLVING PROBLEMS SETTING GOALS	• compared and assessed a variety of venture opportunities	7, 8, 9, 11	
	• prepared a feasibility analysis of a venture idea	27, 28, 29	
ORGANIZING PLANNING MANAGING COMMUNICATING TEAM BUILDING	• established needs, wants and priorities in relation to venture opportunities	12, 14, 26, 27, 29, 30, 31	

★ Activity Reference Number refers to activities listed on the "Student Activity Profile" on the following two pages.

MODULE 1: CHALLENGE AND OPPORTUNITY
STUDENT ACTIVITY PROFILE

Date	Activity Reference Number	Description of Activity	Comments	Date of Completion	Assessment*	Weighting	Extension
Sept 8	1	Bug Journal: Initial	Made my own list	Sept 8			
	2	Expand	Interviewed 5 people	" 10			
	3	Brainstorm/Share/Discuss	Class discussed, shared ideas	" 11			
	4	Complete Bug Journal		" 14	85	10	8.5
	5	Performance Appraisal	Student Thinking Evaluation (Appendix B5)	" 11	S	5	5
Sept 11	6	Portfolio Entry	"Interesting Ideas"	" 11	S		
Sept 14	7	Venture Opportunities: Decision-making Activity		Sept 14			
	8	Decision-making Assignment		" 15	70	5	3.5
	9	Problem-solving Assignment		" 16	65	5	3.3
	10	Case Studies (5)	Compared and assessed	" 18	70	5	3.5
	11	Venture Opportunities	Compared and assessed	" 22	70	5	3.5
	12	Performance Appraisal	Evaluating a Discussion (Appendix B7)	" 14	S	5	5
Sept 18	13	Portfolio Entry	"My Enterprising and Innovative Potential"	" 21	S		
Sept 21	14	Research Assignments:	Project Planning (Appendix B13)	Sept 21	S		
	15	Non-profit Ventures	Identified 3 non-profit ventures; shared this information with class	" 22	80	5	4
	16	Guest Speakers	Invited a guest speaker who had organized a "non-profit venture"	" 24			
	17	Means of Entering Business	Researched and reported on "Purchasing a Business"	" 23	75	5	3.8
	18	Guest Speaker Panel	Compared various means of entering business	" 25			
	19	Performance Appraisal	Student Self-evaluation (Appendix B1)	" 24	S	5	5
Sept 25	20	Portfolio Entry	Identified 5 career options where E & I are important	" 25	S		

* Assessment:

S = Satisfactory

N = Not Satisfactory

% = Per Cent

153

A16

* Consistent effort -
 keep up the good
 work Nicole! jm

jm Sept. 11

jm Sept. 22

jm Sept. 25

MODULE 1: CHALLENGE AND OPPORTUNITY

STUDENT ACTIVITY PROFILE (continued)

Date	Activity Reference Number	Description of Activity	Comments	Date of Completion	Assessment *	Weighting	Extension
Sept 28	21	Venture Planning Project:	Project Planning (Appendix B13)	Sept 30	S		
	22	Regulations/Responsibilities	Self Assessment	Oct 5	65	5	3.3
	23	Components of a Venture Plan	Peer Assessment	" 5	80	5	4
	24	Process of Creating a Venture	Teacher Assessment	" 5	75	5	3.8
	25	Performance Appraisal	Group Member Effectiveness (Appendix B9) (Forgot to hand in.)	" 5	N	5	0
Oct 3	26	Portfolio Entry	Priorized my interesting ideas and researched 3 top ideas	" 3	S		
Oct 5	27	Mini-venture Project:	Project Worksheet (Appendix B12)	" 7	S		
	28	Written Plan	Venture Proposal Guide (Appendix B14)	" 12	75	5	3.8
	29	Feasibility Analysis		" 12	75	5	3.8
	30	Presentation		" 14	85	5	4.3
	31	Performance Appraisal	Oral Presentations/Speeches (Appendix B6)	" 15	S	5	5
Oct 9	32	Portfolio Assessment		" 16	80	10	8
			TOTAL				81.1

JM Oct. 5

Nicole - your venture project has great potential.
Well Done.

JM
Oct. 16

MODULE ____: _____

STUDENT COMPETENCY CHECKLIST

_____ has identified and enhanced the following knowledge, skills
(Student's Name) and attitudes that foster enterprise and innovation.

Areas of Competency	Performance Indicators The student has:	Activity Reference Number★	✓

★ Activity Reference Number refers to activities listed on the "Student Activity Profile".

MODULE ____: _____

STUDENT ACTIVITY PROFILE

Date	Activity Reference Number	Description of Activity	Comments	Date of Completion	Assessment ★	Weighting	Extension

APPENDIX B

	PAGE
"SELF" EVALUATION SAMPLES	
Student Self-evaluation	B1
Personal Participation Assessment Chart	B2
Working with Others Self-appraisal	B3
Personal Performance Appraisal	B4
"OTHER" EVALUATION SAMPLES	
(can be used by instructor and/or students)	
Student Thinking Evaluation	B5
Oral Presentations/Speeches	B6
Evaluating a Discussion	B7
Participation Checklist for Class	
or Small Group Discussions	B8
Group Member Effectiveness	B9
Group Effectiveness Appraisal Form	B10
Observation/Assessment of Group	
Activity/Project	B11
PROJECT/VENTURE PLANNING SAMPLES	
Project Worksheet	B12
Project Planning	B13
Venture Proposal Guide	B14

STUDENT SELF-EVALUATION★

	Very Easily	Easily	With Difficulty
Using My Planning Skills			
1. I understood the topic.	☐	☐	☐
2. I devised research questions.	☐	☐	☐
3. I suggested possible information sources.	☐	☐	☐
4. I chose my questions.	☐	☐	☐
5. I developed a research plan.	☐	☐	☐
Using My Information Retrieval Skills			
1. I identified sources of information:			
- in school	☐	☐	☐
- in the community.	☐	☐	☐
Using My Information Processing Skills			
1. I gathered and organized my information.	☐	☐	☐
2. I discovered information I did not know before.	☐	☐	☐
3. I answered the question(s).	☐	☐	☐
4. I edited my work.	☐	☐	☐
Using My Information Sharing Skills			
1. I presented my research.	☐	☐	☐
Using My Evaluation Skills			
1. I carried out my action plan.	☐	☐	☐
2. I learned the following skills that can be used in other activities:	_____		

★ Adapted from *Focus on Research: A Guide to Developing Students' Research Skills*, Alberta Education, Curriculum Branch, 1990.

PERSONAL PARTICIPATION ASSESSMENT CHART

Name: _____

Activity: _____

Date: _____

Participation Questions

	N E V E R	R A R E L Y	O C C A S I O N A L L Y	F R E Q U E N T L Y
	0	1	2	3
1. Did I contribute ideas without waiting to be asked?				
2. Are the ideas I presented related to the topic being discussed?				
3. Did I add anything to what was said?				
4. Did I listen with an open mind to the opinions of others in the group?				
5. Were my opinions modified as a result of the opinions of others?				
6. Did I help another group member contribute to the group?				
7. Did I get a clearer picture of my own concerns/problems or strengths as a result of this group work?				

TOTAL: _____/21

Examples/Comments: _____

WORKING WITH OTHERS SELF-APPRAISAL ★

- | | frequently | sometimes | not
at all |
|--|-------------|-----------|---------------|
| 1. I contribute ideas and information.
Comments: _____
_____ | ----- ----- | | |
| 2. I ask for clarification of ideas or more information.
Comments: _____
_____ | ----- ----- | | |
| 3. I encourage others to share ideas.
Comments: _____
_____ | ----- ----- | | |
| 4. I help keep the group on task.
Comments: _____
_____ | ----- ----- | | |
| 5. I explain ideas and processes to others.
Comments: _____
_____ | ----- ----- | | |
| 6. I help keep the group organized.
Comments: _____
_____ | ----- ----- | | |

For Next Time: _____

★ Adapted from *Teaching Thinking: Enhancing Learning*, Alberta Education, Curriculum Branch, 1990.

PERSONAL PERFORMANCE APPRAISAL
MODULE ____: _____

1. PERFORMANCE LEVEL

Award yourself a mark you feel you have earned.

_____/100

2. JUSTIFICATION

- Competency Checklist
- Activity Profile
- Explain why you feel you have earned this mark. Describe your performance in the program thus far. Address all aspects of the program: goals and expectations, attitude and professionalism and personal goals and accomplishments you have attained.

• Attached _____

• Attached _____

3. IMPROVEMENT

Explain the areas you feel you need to improve in order to reach your personal level of excellence and professionalism.

4. GOAL SETTING

Identify three personal goals you will work to enhance during the next module. For each outline methods or steps you will take to help realize these goals.

Goal 1: _____
 Method: _____
 Goal 2: _____
 Method: _____
 Goal 3: _____
 Method: _____

5. INTERVIEW

Arrange an interview with your instructor to discuss your Performance Appraisal.

Date: _____
 Discussion Topics: _____

6. COMMENTS:

by Instructor: _____

by Student: _____

Instructor Signature_____
Student Signature

STUDENT THINKING EVALUATION★

Name: _____

Date: _____

Evaluator: _____

Behaviour	Examples
1. Can use mistakes, errors and stepping stones for new ideas.	
2. Shows an awareness of thinking about own thinking.	
3. Shows an ability to go beyond the ideas presented.	
4. Links information with past experiences.	
5. Sorts and restructures ideas to create new meanings.	
6. Shows the ability to defer judgment.	
7. Can produce many ideas and shift perspective with ease.	
8. Generates and selects criteria for evaluation.	
9. Plans, self-evaluates and monitors thinking.	
10. Develops standards for good thinking.	
11. Solves problems effectively with others.	
12. Other.	

★ Adapted from *Teaching Thinking: Enhancing Learning*, Alberta Education, Curriculum Branch, 1990.

ORAL PRESENTATIONS/SPEECHES★

Topic: _____

Name: _____

Evaluator: _____

Presentation Qualities	Very Well 3	Satisfactory 2	Needs Improvement 1
1. Gave an interesting introduction.			
2. Presented clear explanation of topic.			
3. Presented information in acceptable order.			
4. Used complete sentences.			
5. Offered concluding summary.			
6. Spoke clearly, correctly, distinctly and confidently.			
7. Maintained eye contact.			
8. Maintained acceptable posture.			
9. Maintained the interest of the class.			
10. Used audio or visual aids.			
11. Handled questions and comments from the class.			

TOTAL /33

Comments: _____

★ Adapted from *Focus on Research: A Guide to Developing Students' Research Skills*, Alberta Education, Curriculum Branch, 1990.

EVALUATING A DISCUSSION

Topic: _____

Group Members:

Date: _____

1. _____

2. _____

Evaluator: _____

3. _____

4. _____

Place a "✓" each time a group member makes a discussion contribution.

Discussion Contributions	Group Member			
	1	2	3	4
• volunteered information				
• contributed an idea				
• hitchhiked on another's idea				
• questioned another's idea				
• related specific ideas to more general concepts or principles				
• provided examples to support thinking				
• posed relevant questions				
• asked for justification				
• asked for clarification				
• showed a willingness to be questioned				
• listened without interruption				
• considered facts before reaching conclusions				
• showed respect for others				

Comments: _____

PARTICIPATION CHECKLIST FOR CLASS OR SMALL GROUP DISCUSSIONS

[illegible]

GROUP MEMBER EFFECTIVENESS

Project Title: _____

Group: _____

Name: _____

Rating Scale:

4 = Always

3 = Frequently

2 = Occasionally

1 = Never

- | | | | | |
|---|---|---|---|---|
| • was on time | 4 | 3 | 2 | 1 |
| • attended group sessions | 4 | 3 | 2 | 1 |
| • took an active part and contributed information and ideas | 4 | 3 | 2 | 1 |
| • had a positive, rather than negative or critical, approach | 4 | 3 | 2 | 1 |
| • listened when others spoke | 4 | 3 | 2 | 1 |
| • respected and interacted with other members | 4 | 3 | 2 | 1 |
| • respected individual differences | 4 | 3 | 2 | 1 |
| • avoided prejudice and kept biases out | 4 | 3 | 2 | 1 |
| • was open to the ideas and suggestions of others | 4 | 3 | 2 | 1 |
| • encouraged non-contributors to take part | 4 | 3 | 2 | 1 |
| • accepted responsibility for the consequences of their behaviour | 4 | 3 | 2 | 1 |
| • was sensitive to the feelings and concerns of others | 4 | 3 | 2 | 1 |
| • was genuine and open | 4 | 3 | 2 | 1 |
| • supported others and helped them articulate their ideas | 4 | 3 | 2 | 1 |
| • helped the group by summarizing, clarifying, mediating, praising and encouraging | 4 | 3 | 2 | 1 |
| • used problem solving, decision making and conflict resolution frames of reference | 4 | 3 | 2 | 1 |
| • took responsibility as group leader, recorder or group effectiveness monitor as appropriate | 4 | 3 | 2 | 1 |

Helpful comments: _____

GROUP EFFECTIVENESS APPRAISAL FORM ★

Name: _____ Group: _____

Project Title: _____

Audience: _____

Rate Your Group on a 1 to 5 Basis (5 = excellent; 4 = very good; 3 = good; 2 = fair; 1 = needs improvement)

- | | |
|---|-----------|
| 1. We worked cooperatively with all group members. | 5 4 3 2 1 |
| 2. We accomplished what we set out to complete. | 5 4 3 2 1 |
| 3. We were satisfied with our performance of this group task. | 5 4 3 2 1 |
| 4. We used our group time efficiently without wasting or misusing it. | 5 4 3 2 1 |
| 5. We all contributed fairly to the completion of this group task. | 5 4 3 2 1 |

Personal Assessment and Observations

1. Did you feel satisfied with your own participation in the project? Discuss your feelings honestly.

2. Do you think that the project participation was fairly equal; that is, do you feel others in your group worked well and contributed fairly? _____

3. Do you think there are some ways your group could have improved, and thereby produced a better finished project?

4. Did you like doing a project like this, or do you honestly prefer to work on your own? (Please answer by explaining why or why not.) _____

5. Please add any helpful comments you can think of: _____

★ Adapted from *The Writing Process Using the Word Processor*, Inservice Leader's Reference Manual, Alberta Education, 1988, pp. 2-70, 2-71.

OBSERVATION/ASSESSMENT OF GROUP ACTIVITY/PROJECT

Project Description: _____

Date: _____

Group Members: _____

Evaluator: _____

Project was submitted

☐ on time☐ late

Reason: _____

Mark

_____/10

Content:

- evidence of research
- appropriate
- complete
- format

_____/40

Presentation:

- effective coverage of information (clear, concise)
- evidence involvement encouraged (eye contact, questions)
- use of audio or visual aids

_____/30

Group Evaluation:

- What mark should be allocated?
Justification (attached).
- Should all members of the group receive the same mark? Yes/No
Justification (attached).

_____/10

Reflection:

- What was learned?
Description (attached): Summarize the major points covered in the presentation. Include such things as the focus or emphasis of the presentation. You may wish to use a concept map. Note any questions you still have or could pose.

_____/10

TOTAL

_____/100

Comments:

PROJECT WORKSHEET

Name: _____

Project: _____

Task to be completed:

Time line:

Resources/materials I will need are:

Source/availability:

What procedures will I follow:

Details:

Problems that might arise:

Solutions:

Changes I need to make:

Time line:

PROJECT PLANNING

Name: _____

Project: _____

	very well	OK	could improve
1. I defined my topic. Comments: _____ _____	☐	☐	☐
2. I collected sufficient information. Comments: _____ _____	☐	☐	☐
3. I verified information. Comments: _____ _____	☐	☐	☐
4. I combined, restructured and produced new information. Comments: _____ _____	☐	☐	☐
5. I planned and regulated my time and organization. Comments: _____ _____	☐	☐	☐
6. I communicated my findings to others. Comments: _____ _____	☐	☐	☐
7. I evaluated my entire process. Comments: _____ _____	☐	☐	☐

Highlights: _____

_____Improvements: _____

VENTURE PROPOSAL GUIDE

The purpose of this guide is to help you organize a venture project for yourself or your group. You should develop your idea and conduct three to five hours of research before completing it. When you have completed this form, make arrangements to discuss it with your instructor to assess its merits. When he or she is satisfied that the project is worthwhile and possible, then this proposal form will become the basis for your project and its evaluation.

Project Title: _____

Name: _____

The Rationale: Why does this represent an opportunity?

The Idea: Describe, in general, what it is that you intend to do.

Objectives: — Specifically, what do you want to achieve? What form will your finished venture take?

Research: What key information is required? Where/how can this information be obtained?

Time: How much time will it take? What proportion of the module will this proposal account for? Develop a time line for your venture by identifying the various phases and the time, including dates for start and finish of each phase.

Market Analysis: Is there a demand for the product/service?

Risk Assessment: What are the risks that are involved? What are the probabilities that will occur? Which risks are controllable and which are not?

Financial Analysis: What is the detailed budget for this venture? What will be the cash flow requirements? How will the venture be funded?

Success Strategy: What is the likelihood of success? What are the implications of success?